Fruit Situation

Economics, Statistics,
and Cooperatives Service

U.S. Department of
Agriculture

Approved by the
World Food and
Agricultural Outlook
and Situation Board

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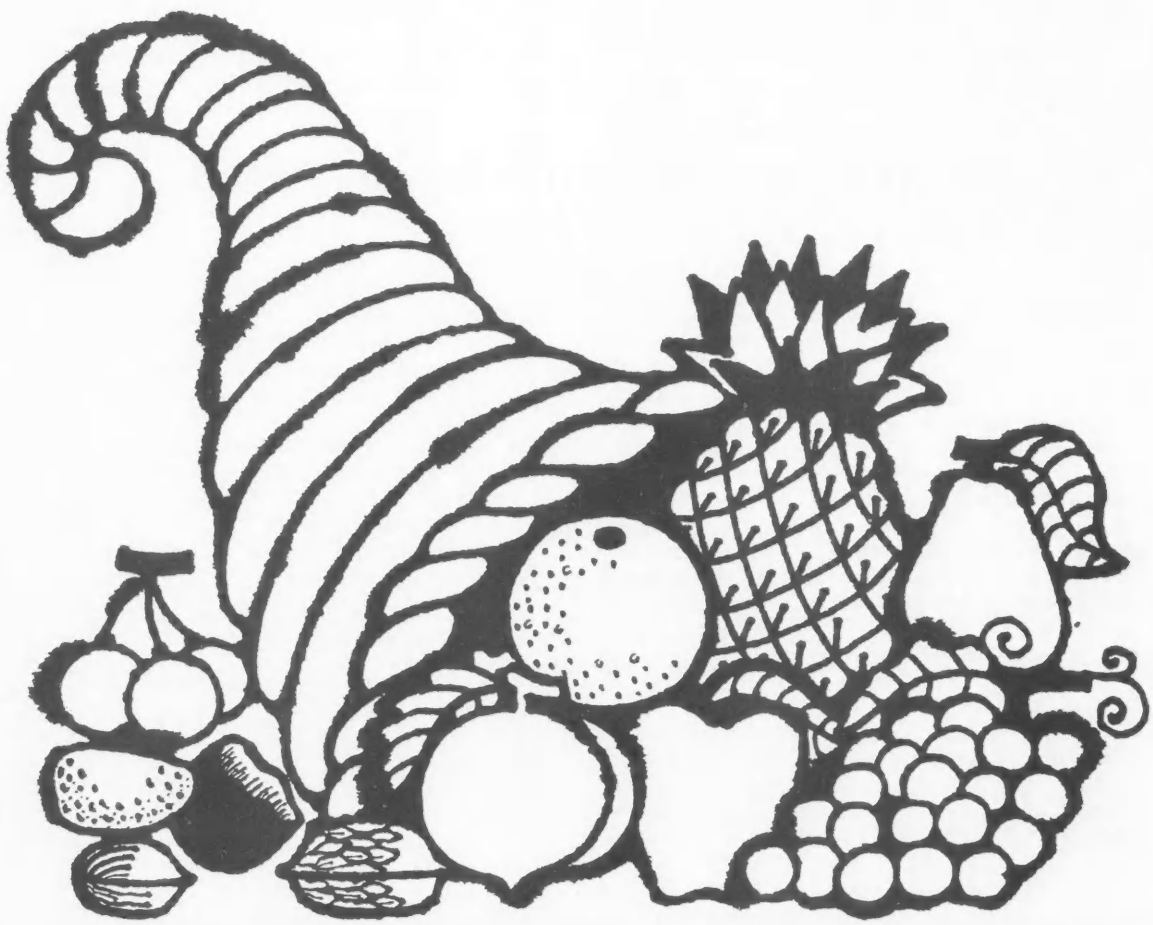
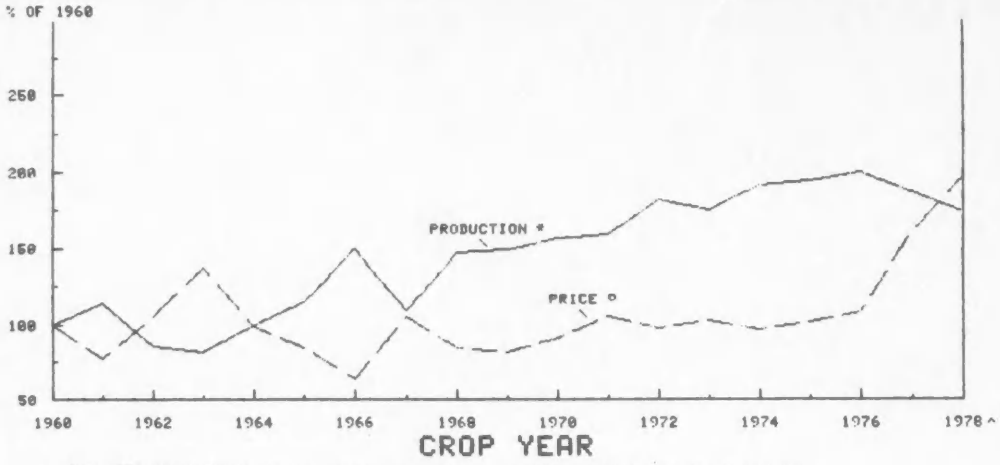


CITRUS FRUIT PRODUCTION AND FARM PRICES



* INCLUDES PRODUCTION OF ALL CITRUS FRUITS. o SEASON AVERAGE PRICE TO GROWERS. PRICE WEIGHT BY PRODUCTION. ^ PRELIMINARY.

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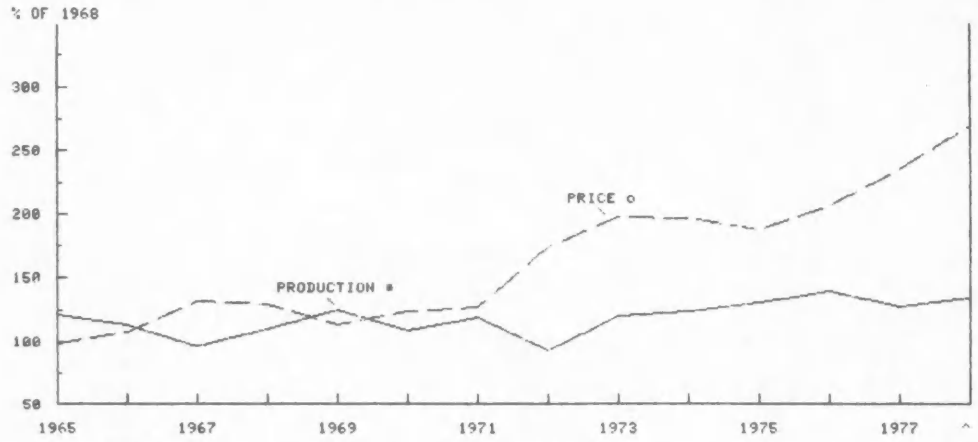
NEG. ESCS 2042-79 (10)

NONCITRUS FRUIT PRODUCTION AND FARM PRICES



* 15 IMPORTANT FRUITS. o SEASON AVERAGE PRICE TO GROWERS. PRICE WEIGHT BY PRODUCTION. ^ 1978 PRELIMINARY.

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NFG. ESCS 8485-79 (10)

THE FRUIT SITUATION

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Principal Contributor:
Ben W. Huang
(202) 447-7133

National Economics Division
Economics, Statistics, and Cooperatives Service
U.S. Department of Agriculture
Washington, D.C. 20250

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SUMMARY

Record Large Citrus Supplies Suggest Lower Grower Prices

A record citrus crop is forecast for the 1979/80 season and noncitrus fruit production is estimated to be moderately larger than in 1978. The September index of prices received by growers for fresh and processing fruit fell sharply. The decline was primarily caused by lower prices and larger supplies of peaches and pears which also dampened citrus prices. The index was almost 22 percent below a year ago and is expected to remain below year-earlier levels at least through midwinter if the record citrus crop materalizes. Likewise, the Consumer Price Index (unadjusted) for fresh fruit declined in September, but will remain above a year ago because of the continued increase in marketing costs.

The October 1 forecast of the 1979/80 citrus crop indicates a record 15.2 million tons, primarily oranges (excluding grapefruit in California other than desert areas), 15 percent above 1978/79. Florida's round orange crop is forecast at 200 million boxes, 22 percent above last season. Orange output in Arizona and California is expected to be 14 and 32 percent larger, respectively as most trees have recovered well from the freeze of last December and January. However, Texas production under the impact of last winter's freeze, is estimated at 4 million boxes, down from 6.4 million a year ago.

Grapefruit crop prospects for the 1979/80 season (excluding California's "other areas") point to a 63.7 million boxes, 1 percent less than last season, due entirely to a sharp decrease in Texas output. Florida's grapefruit crop, forecast at 51 million boxes, is up slightly from last season. The Arizona-California lemon crop is estimated at 18.3 million boxes, 6 percent below last season's freeze-damaged crop and 30 percent less than the 1977/78 crop.

Opening f.o.b. prices for Florida oranges were slightly lower than a year ago in a light, early season volume. With an expected larger carryover of frozen concentrated orange juice (FCOJ) plus the record orange crop, market prospects for oranges through this mid-winter point to grower prices

below last year's levels. These lower grower prices are expected to result in lower retail prices even with the continued increase in marketing costs. Opening f.o.b. prices for Florida grapefruit were moderately higher for white seedless but lower for pink seedless. The slightly smaller grapefruit crop is expected to result in near average price for this season if processor demand for new crop fruit is stimulated by expected smaller carryover stocks of processed items and if fresh grapefruit exports keep increasing. The record orange crop may dampen grapefruit prices. With the smaller crop, lemon prices are expected to remain higher throughout the season.

Output of most processed citrus items in 1979/80 is expected to increase particularly frozen concentrated orange juice if the current crop expectations are realized. Thus, combined with the larger carryover stocks in prospect, total supplies of FCOJ during the coming season will be large. Consequently, f.o.b. and retail prices for FCOJ are expected to ease somewhat.

The 1979 noncitrus fruit crop including 10 major fruits is forecast at 12.2 million tons, almost 4 percent above 1978 and 8 percent larger than 1977. Larger crops were estimated for all fruits, except apples and tart cherries. The apple crop is estimated at 7.58 billion pounds, 1 percent smaller than last year's record crop. Shipping point f.o.b. prices for apples are moderately higher than last year. Supplies for fresh market may be smaller this season since the crop is smaller and processor demand is good.

The 1979/80 pack of most processed noncitrus fruit will be larger than a year ago, but total supplies of canned fruit will not increase appreciably because of smaller carryover stocks. Prices at both retail and wholesale levels for most canned fruit this fall and winter will remain relatively firm because of higher costs of raw products and increased marketing and processing costs.

Total supplies of frozen fruit and berries are expected to be smaller and prices for these commodities will continue to rise. In contrast, sharply larger available supplies of raisins this season point to substantially lower prices.

The total crop of domestic tree nuts (almonds, filberts, pecans, and walnuts) is estimated at 632,175 tons (in-shell basis), 43 percent larger than 1978. Sharply larger crops of almonds and walnuts are chiefly responsible, while crops of pecans and filberts are expected to be smaller. However, supplies of pecans will be larger because of considerably larger carryover stocks. Even with the record crop, almond prices are expected to remain relatively firm because world demand is expected to be strong. Prices for pecans and walnuts will decline from last year's high in response to larger supplies. In view of tight world supplies, prices for filberts are expected to be strong.

RECENT DEVELOPMENTS AND OUTLOOK

GENERAL PRICE OUTLOOK

Generally good demand and smaller supplies pushed prices received by growers for fresh and processing fruit somewhat higher in 1979. The index of prices received by growers for fresh and processing fruit during the first 9 months of 1979 averaged almost 5 percent above a year ago. However, the September index dropped sharply to 217 (1967=100) from 278 in August, 22 percent below year-earlier level. The sharp decline in the September price index was primarily caused by lower prices and larger supplies of peaches and pears which also dampened citrus prices. Prices lower than a year ago were reported for peaches, pears, oranges and grapefruit while prices of lemons and strawberries were still higher. Apples at 15.8 cents per pound remained unchanged.

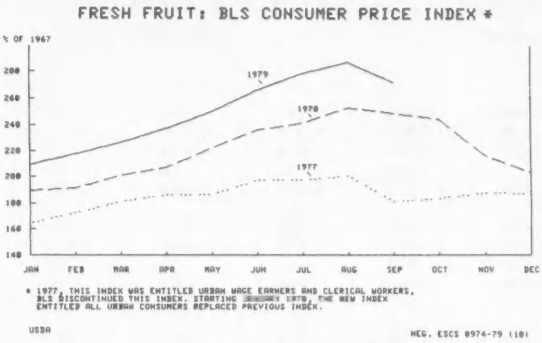
With the seasonal increase in supplies, fruit prices are likely to continue to decline in the fourth

Table 1—Index of quarterly prices received by growers for fresh and processed fruit

Year	(1967=100)			
	1st	2nd	3rd	4th
1975	129	152	140	130
1976	126	126	130	135
1977	142	150	160	200
1978	196	227	263	222
1979	224	238	256	

Source: Agricultural Prices, CRB, ESCS.

quarter. The record large citrus crop for the 1979/80 season is expected to keep the index of price received by growers for fresh and processing fruit below that of the fourth quarter a year ago.


FRESH FRUIT: BLS CONSUMER PRICE INDEX *
% OF 1967
1979
1978
1977
JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC
* 1977, THIS INDEX WAS ENTITLED URBAN WAGE EARNERS AND CLERICAL WORKERS, BLS DISCONTINUED THIS INDEX. STARTING JANUARY 1978, THE NEW INDEX ENTITLED ALL URBAN CONSUMERS REPLACED PREVIOUS INDEX.
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NEG. ESCS 8974-79 (10)

However, the 1979 index will still average moderately higher than a year ago reflecting higher prices in the first 3 quarters.

Marking the first decline in 1979, the Bureau of Labor Statistics (BLS) September retail price index for fresh fruit (unadjusted) fell to 271.6 (1967=100) from 286.9 in August. But it was still 9.4 percent above a year ago. With the seasonal increase in supplies of fresh fruit particularly apples and oranges, retail prices are expected to decline further. However, the continued increase in marketing costs particularly transportation may keep retail price for fresh fruit this fall and winter moderately above year-earlier levels. The rate of increase could be more moderate than was observed in the first 3 quarters of 1979. For the year 1979 retail price index for fresh fruit will average between 10 to 15 percent above 1978.

Wholesale prices of almost all processed fruits have been moderately to substantially higher than a year ago. The BLS September wholesale price index for canned fruit continued to advance to 220.6 (1967=100), 10 percent above last year. Even with a larger pack, total supplies of canned fruit will not increase appreciably because of smaller carryover stocks for most canned fruit. Prices will remain firm because most noncitrus fruits for processing use were contracted at higher levels. Costs of processing have also increased as a result of higher labor cost and the increase in prices of tinplate.

Table 2—Quarterly consumer price indexes for fresh fruit

Year	(1967=100)			
	1st	2nd	3rd	4th
1975.....	150	171	177	147
1976.....	146	161	170	166
1977.....	172	190	193	185
1978[1]....	196	223		
1978[2]....	194	222	247	221
1979.....	218	251	279	

[1] From 1975-June 1978, these indexes were entitled Urban Wage Earners and Clerical Workers, BLS discontinued these indexes as of June 1978. [2] Starting with Jan. 1978 new index entitled All Urban Consumers, replaces previous index.

Source: Bureau of Labor Statistics.

The September wholesale price index for frozen fruit and juices advanced only slightly from August, but was still almost 9 percent above last year. Higher prices for frozen strawberries caused the main increase in wholesale prices while those of frozen concentrated orange juice (FCOJ) have remained steady since last December. Since larger supplies of FCOJ for the 1979/80 season are expected, prices are likely to ease somewhat.

Because of a larger pack in prospect, wholesale prices of raisins have dropped substantially, but are still sharply above year-earlier levels. Prices for dried prunes have been steady at levels sharply above a year ago. The September wholesale price index for dried and dehydrated fruits at 460.2 (1967=100) was still 60 percent above last year. However, prices of raisins are expected to be lower than a year ago, but those of dried prunes will remain firm in response to the expected smaller supply.

Table 3—Quarterly wholesale price indexes for canned fruit

Year	(1967=100)			
	1st	2nd	3rd	4th
1975.....	170.3	170.7	167.3	164.9
1976.....	162.8	164.9	171.2	174.0
1977.....	175.4	179.0	179.6	181.8
1978.....	183.4	187.1	198.2	206.7
1979.....	210.8	214.4	218.5	

Source: Bureau of Labor Statistics, U.S. Department of Labor.

FRESH CITRUS

The first forecast of the 1979/80 citrus crop (excluding grapefruit in California other than desert areas), indicated a record 15.2 million tons, 15 percent above 1978/79. Larger crops are currently expected for all citrus except grapefruit and lemons.

Oranges

Record Crop Expected

The October 1 forecast for the 1979/80 season points to a record orange crop of 11.1 million tons, 22 percent greater than last season's crop and 5

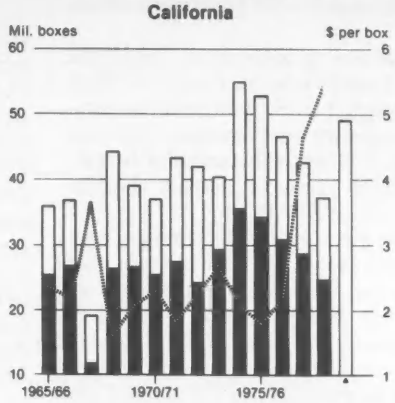
Table 4—Citrus fruit: Production, 1977/78, 1978/79, and indicated 1979/80[1]

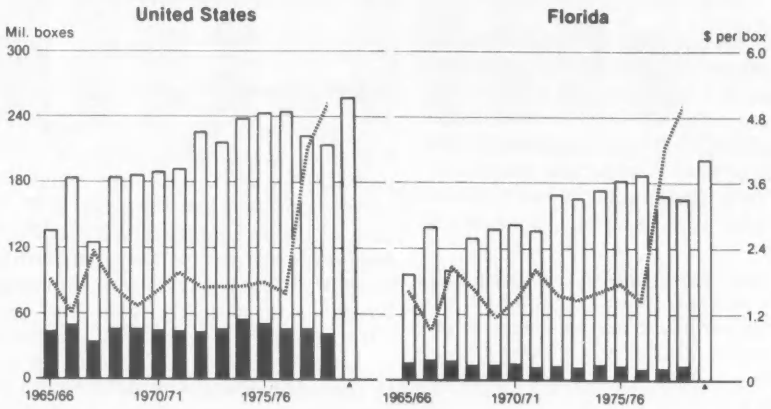
Crop and State	Boxes			Ton equivalent		
	Utilized		1979/80	Utilized		1979/80
	1977/78	1978/79		1977/78	1978/79	
	1,000 boxes[2]			*1,000 tons*		
Oranges:						
Early, Midseason and Navel varieties[3]:						
California	20,000	20,800	26,000	750	780	975
Florida	88,300	91,000	115,000	3,974	4,095	5,175
Texas	3,850	4,300	2,600	164	183	111
Arizona	820	700	700	31	26	26
Total	112,970	116,800	144,300	4,919	5,084	6,287
Valencias:						
California	22,600	16,400	23,000	848	615	863
Florida	79,500	73,000	85,000	3,578	3,285	3,825
Texas	2,250	2,100	1,400	96	89	60
Arizona	2,800	2,200	2,600	105	83	98
Total	107,150	93,700	112,000	4,627	4,072	4,846
All Oranges:						
California	42,600	37,200	49,000	1,598	1,395	1,838
Florida	167,800	164,000	200,000	7,552	7,380	9,000
Texas	6,100	6,400	4,000	260	272	171
Arizona	3,620	2,900	3,300	136	109	124
Total oranges	220,120	210,500	256,300	9,546	9,156	11,133
Grapefruit:						
Florida all	51,400	50,000	51,000	2,185	2,125	2,168
Seedless	43,000	42,700	44,000	1,828	1,815	1,870
Pink	14,300	13,300	14,000	608	565	595
White	28,700	29,400	30,000	1,220	1,250	1,275
Other	8,400	7,300	7,000	357	310	298
Texas	11,900	9,000	6,500	476	360	260
Arizona	3,000	2,250	2,700	96	72	86
California	8,360	5,770	---	273	189	---
Desert Valleys	4,200	3,270	3,500	134	105	112
Other areas[4]	4,160	2,500	---	139	84	---
Total grapefruit	74,660	67,020	---	3,030	2,746	---
Lemons:						
California	20,300	13,900	15,000	771	528	570
Arizona	5,800	5,500	3,300	220	209	125
Total lemons	26,100	19,400	18,300	991	737	695
Limes:						
Florida	460	720	1,100	18	29	44
Tangelos:						
Florida	4,900	4,200	5,000	221	189	225
Tangerines:						
Florida	3,200	3,500	4,100	152	166	195
Arizona	600	450	600	23	17	23
California	1,400	1,450	1,700	53	54	64
Total tangerines	5,200	5,400	6,400	228	237	282
Temples:						
Florida	4,900	4,700	5,400	221	212	243
Total[5]	336,340	311,940	356,200	14,255	13,306	15,248

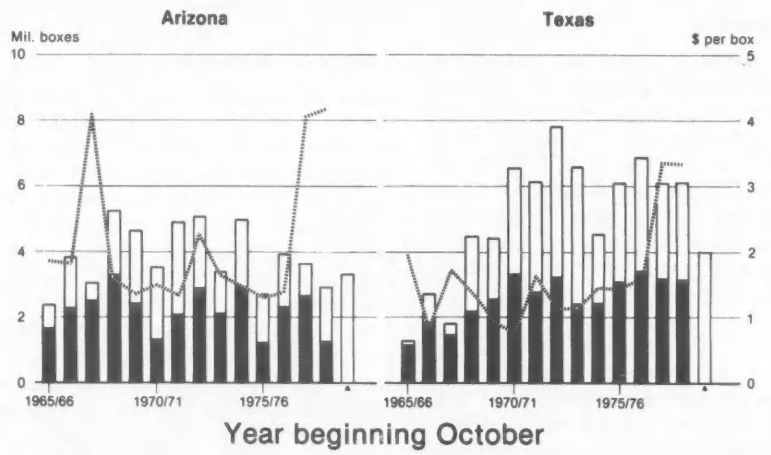
[1] The crop year begins with bloom of the first year shown and ends with completion of harvest the following year. [2] Net content of box varies. Approximate averages are as follows: Oranges-California and Arizona, 75 lbs.; Florida, 90 lbs.; Texas, 85 lbs.; Grapefruit-California, Desert Valleys, and Arizona, 64 lbs.; other California areas, 67 lbs.; Florida, 85 lbs.; Texas, 80 lbs.; Lemons, 76 lbs.; Limes, 80 lbs.; Tangelos, 90 lbs.; Tangerines-California and Arizona, 75 lbs.; Florida, 95 lbs.; and Temples 90 lbs. [3] Navel and miscellaneous varieties in California and Arizona. Early and midseason varieties in Florida and Texas, including small quantities of tangerines in Texas. [4] The first forecast for California grapefruit "other areas" will be as of December 1, 1979. [5] Excludes California grapefruit in "other areas."

Sources: Crop Production, CRB, ESCS and Floridia Crop and Livestock Reporting Service.

Oranges: Production, Utilization and Prices







*Production having value.
△On-tree price to growers.
▲1979/80 data October 1, indication of total production.

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percent above the previous record set in 1976/77. Larger output is indicated for all producing areas, except Texas.

Crop prospects also are up sharply in California and Florida. The two States account for 97.2 percent of the prospective U.S. orange crop, compared with 95.6 percent last season. Arizona orange production is forecast substantially larger, while orange output in Texas is forecast sharply below last season.

Although bearing acreage in Florida has declined, all orange prospects are placed at a record 200 million boxes, 22 percent above last season. Production of early and midseason varieties is expected to be 26 percent larger, with Valencia production up 16 percent. The larger crop is attributed to an increase in yield as most trees in Florida have recovered well from the freeze damage in January 1977.

In California, the orange crop is forecast at 49 million boxes, 32 percent more than last season's freeze damaged crop. The estimates are up for both Navel and Valencia crops by 25 and 40 percent, respectively. The crop in California appears to be in very good condition; most Navel trees sustained no lasting damage from the freezes of last December and January, and the Valencia bloom was excellent.

The Arizona orange crop is expected to total 3.3 million boxes, up 14 percent. Orange production in Texas is forecast at 4 million boxes, a decrease of 37 percent. However, the trees themselves recovered remarkably well following last winter's freeze.

Export Demand to Improve

U.S. exports of fresh oranges and tangerines from November 1978 through August 1979 totaled 271,783 metric tons, 12 percent below the same period a year ago, reflecting reduced supplies and higher prices. Reduced shipments were recorded for almost all areas. Nevertheless, Japan, our third major customer, increased its purchases by 25 percent from a year ago. Exports to Japan will continue to improve as Japan has increased its import quota for U.S. oranges. With record orange production in the United States, U.S. exports of oranges are expected to increase moderately.

Imports of fresh oranges and tangerines during the first 8 months of 1979 amounted to 21,256 metric tons, an increase of 34 percent from last year, reflecting reduced supplies and good demand. The increases were entirely from Mexico with an increase of 50 percent from last year. Mexico accounted for 80 percent of the imports, compared with 71 percent a year ago. Shipments from Israel were down 5 percent. U.S. imports should be smaller this season in view of the record orange crop.

Market Prospects

Opening f.o.b. prices for Florida oranges were slightly lower than a year ago in a light, early season volume. Orange prices received by growers for the 1979/80 season are expected to average lower than last season if the current prospects for a record crop materialize. A record orange crop in Florida combined with larger carryover stocks of frozen concentrated orange juice definitely will result in lower grower prices. Larger supplies of fresh oranges from California coupled with larger Florida orange supplies, will also cause lower prices for fresh markets. Current prospects for oranges through the winter point to grower prices declining seasonally to levels below last year's high prices. These lower prices likely will be reflected at the retail level even with the continued increase in costs of marketing.

Grapefruit

Slightly Smaller Crop in Prospect

Prospects for the 1979/80 season (excluding California's "other areas") point to a 63.7 million box grapefruit crop, 1 percent less than last season and 10 percent smaller than the 1977/78 season, due entirely to a sharp decrease in Texas where trees were damaged by the freeze last winter.

Florida's grapefruit crop, forecast at 51 million boxes, is up slightly from last season for both white and pink seedless. Other varieties were down moderately. The Texas crop at 6.5 million boxes is 28 percent below the 1978/79 crop. Larger crops are forecast for both Arizona and California desert area. Limited harvest has begun in all States.

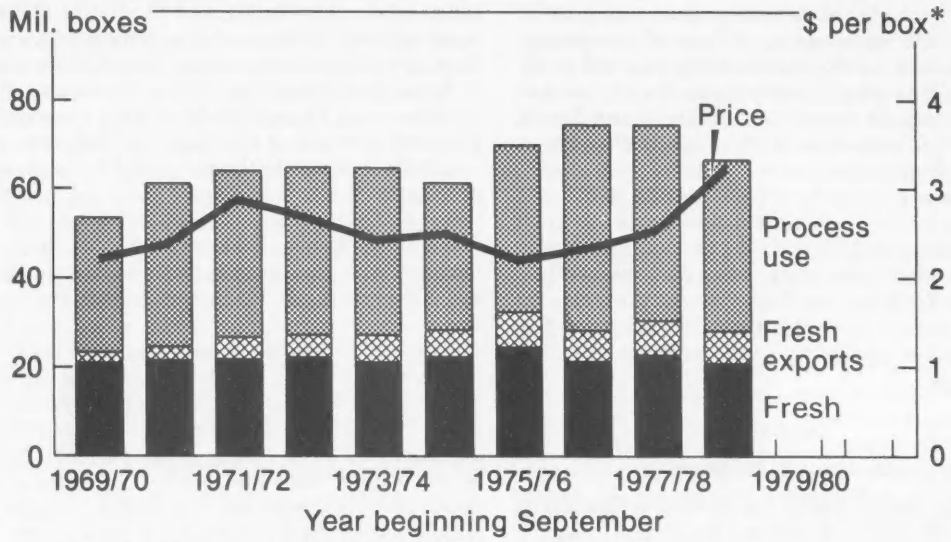
Exports Up Moderately

Fresh grapefruit exports through August, 1979 for the 1978/79 season totaled 278,439 metric tons, an increase of 5 percent from last season. A 27-percent increase in shipment to Japan, our largest customer, was chiefly responsible. Western Europe, our second largest customer reduced their purchases by 9 percent because of relatively higher prices. A sharp decrease in shipments to Canada was recorded and its share also was down sharply from 23 percent to 17 percent. The recent gain in U.S. dollar if it continues, against the Japanese Yen could dampen our exports to Japan. The export market is of vital importance to domestic growers.

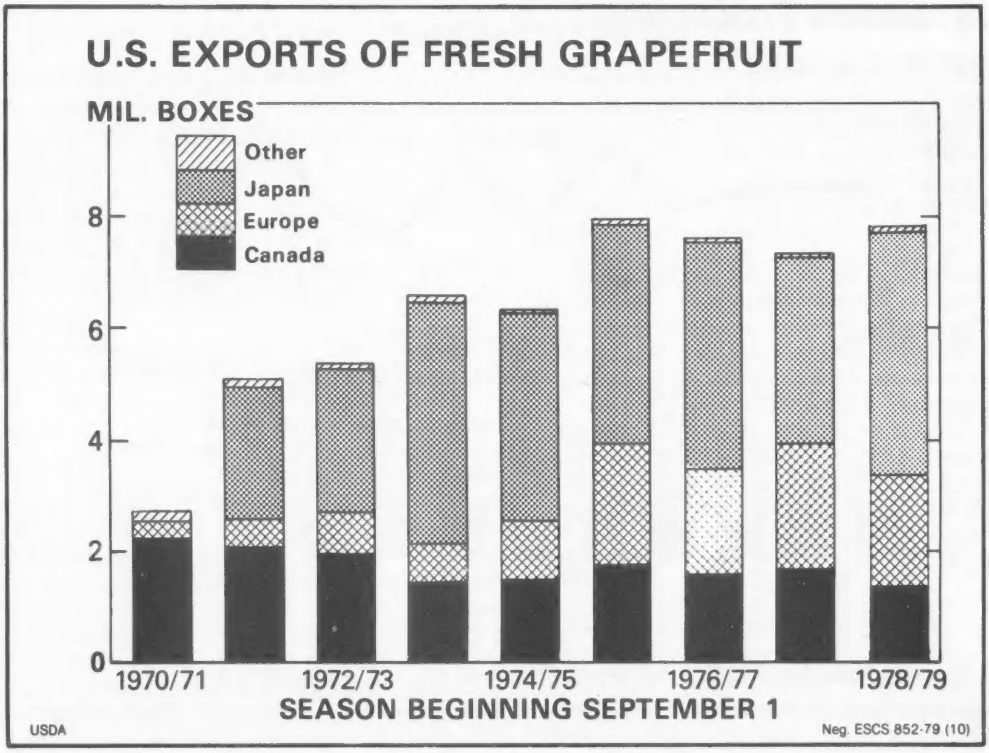
Market Prospects

Smaller supplies prospect and good processor demand could result in near average price for grapefruit during the 1979/80 season. Carryover stocks of most processed grapefruit products are down in the beginning of the 1979/80 season.

U.S. Grapefruit Production, Use, and Prices



Data from Crop Reporting Board and Bureau of Census.
*Season average packing house door returns.



Demand for both chilled and frozen concentrated grapefruit juices have shown good growth patterns in recent years. However, the record orange crop could exert some downward pressure in grapefruit prices. The average U.S. price for all grapefruit—$2.17 per box, (equivalent on-tree returns) for 1978/79—was up 40 percent from the preceding season. Because of the substantially reduced available supplies of grapefruit for fresh market resulting from the freezes in California and Texas, 1978/79 U.S. prices for fresh grapefruit averaged 42 percent higher than in 1977/78.

Shipments of grapefruit from Florida and Texas were substantially behind last year's pace through mid-October. Opening f.o.b. prices for Florida grapefruit were moderately lower for pink seedless but higher for white seedless. Current prospects for fresh grapefruit through the mid-winter point to grower prices declining seasonally to near last year's levels.

Lemons

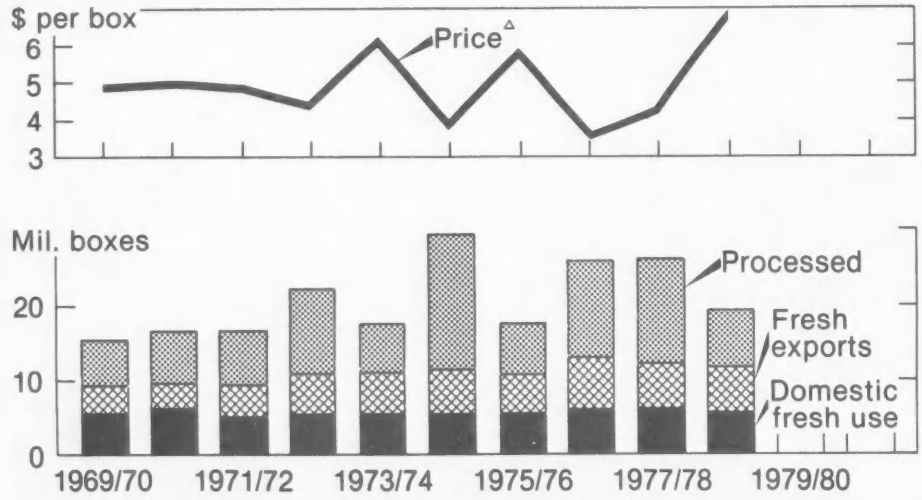
Moderately Smaller Crop in Prospect

The Arizona-California lemon crop is forecast at 18.3 million boxes, 6 percent below last season's freeze-damaged crop and 30 percent less than the 1977/78 crop. The Arizona crop is expected to total 3.3 million boxes, a decrease of 40 percent from last season. The crop in California is forecast at 15 million boxes, 8 percent more than the 1978/79 crop. Lemon quality is good in central California. Last winter's freezes and the June heat wave were detrimental to the crop in southern California.

Total movement this season through early mid-October was sharply behind last season's pace. Shipments to export markets were only half of last season's volume. Deliveries to both the fresh and processing markets have also been well behind last year. Reflecting a smaller crop, f.o.b. prices for fresh lemons opened sharply higher. Prices have declined with increased volume, but so far this season have averaged 55 percent higher than a year ago.

The 1978/79 season average price received by growers (equivalent on-tree returns) for all uses of lemons was $4.69 a box, compared with $2.27 for 1977/78. Equivalent on-tree returns for fresh use averaged $8.24 per box, a third higher than the season before. With the smaller crop, lemon prices received by growers are expected to remain moderately higher than last season's high prices.

U.S. Lemon Production, Use and Prices*



* Year beginning November 1969/70 and August beginning 1970/71 to date.
Date from Crop Reporting Board and Bureau of Census.
△Season average packing house door returns.

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Other Citrus Fruit

Sharply Larger Tangelo Crop

The 1979/80 Florida tangelo crop, excluding K-Early citrus fruit, is forecast at 5 million boxes, 19 percent above last season's small crop and 2 percent more than was harvested in 1977/78. More tangelo crop usually goes to processing outlets than for fresh market. Last season, 59 percent of the crop was processed, the same as the 1977/78 season. Because of sharply higher prices for fresh market, on-tree return for tangelos for all sales in 1978/79 averaged $3.75 per box, 14 percent above 1977/78. On-tree return for processing use averaged $2.95 a box in 1978/79, the same as 1977/78. Prices this season will average moderately lower.

More Tangerines

The tangerine crop is forecast at 6.4 million boxes, 19 percent more than last season. Larger output is expected for all producing States. The Florida forecast of 4.1 million boxes is for that portion of the crop expected to reach a size of 210 fruit per 4/5 bushel carton by December 1. California expects 1.7 million boxes, 17 percent above last season and Arizona growers expect to pick 600,000 boxes, 33 percent more than last season.

Tangerines predominantly are a fresh market crop, with normally two-thirds going to fresh outlets. Because of the sharply reduced utilization of Arizona crop for fresh market, the proportion of tangerines for fresh use declined to 57 percent last season.

Despite the larger crop last year, the season average price for all uses received for growers in 1978/79 was $5.64 a box, (equivalent on-tree returns), 12 percent above the preceding season. Grower returns are higher for tangerines in Arizona and California than in Florida, where a large proportion of tangerines are processed for juice. The sharply larger crop combined with a record orange crop are expected to result in tangerine prices received by growers moderately to substantially lower this season than 1978/79.

Temple Crop

Florida's Temple crop is forecast at 5.4 million boxes, 15 percent above last season. Over half of the Temple crop is usually sold for processing use. During the 1978/79 season, grower returns for all uses averaged $4.95 a box (equivalent on-tree returns), up slightly more than a dollar from 1977/78. Prices for fresh use were up 16 percent while those for processing use were 35 percent higher. Prices are expected to average lower this season.

PROCESSED CITRUS

Smaller Processing Use Last Season

Because of the smaller 1978/79 citrus crop, the amount for processing declined to 9.8 million tons, compared with 10.5 million tons during the preceding season. However, processing use still accounted for almost 74 percent of the total crop, the same as the 1977/78 season. More than fourth-fifths of oranges sold were processed, as were nearly 58 percent of the grapefruit and 39 percent of the lemons.

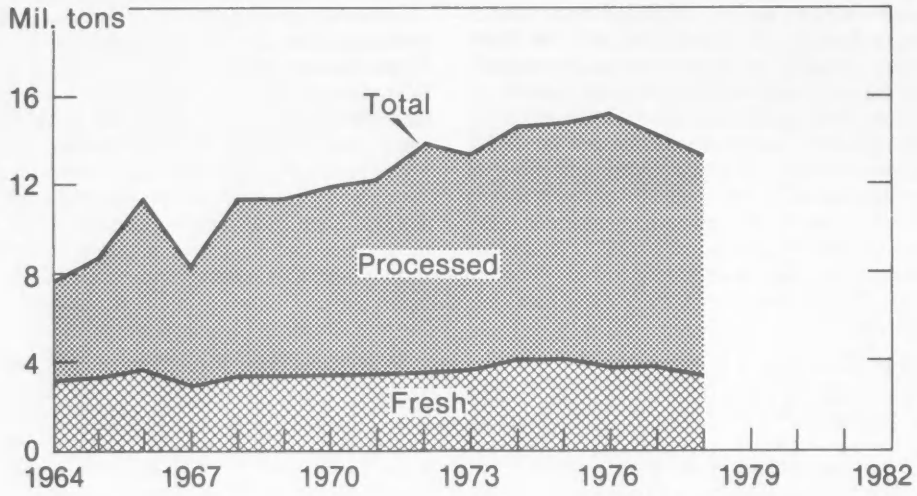
In Florida, oranges used for processing accounted for 92.9 percent of the total orange crop in 1978/79, a decline in both absolute and relative terms. Florida oranges sold for fresh increased almost 18 percent from 1977/78 primarily because of the smaller available supply of California oranges for fresh market resulting from the January freeze. The percentage of the oranges processed including tangelos, Temples, tangerines and K-early citrus, for frozen concentrated orange juice reached almost 82 percent of total processing use, up from 80 percent a year earlier. However, the quantity of fresh oranges used for chilled products declined in both absolute and relative terms.

The sharply reduced supply of Texas grapefruit for fresh market resulted in substantial increase in fresh utilization of Florida grapefruit. Grapefruit sold for fresh accounted for almost 40 percent compared with 35 percent from the preceding season. Nevertheless, the share of grapefruit used for frozen concentrate juice continued to go up to 44 percent of total processing grapefruit compared with 42 percent a year ago.

In California, the January 1979 freeze substantially reduced the utilization of oranges for fresh market, particularly Valencias. The total fresh use of oranges was down almost 15 percent from the preceding season, while Valencia used fresh decreased almost 25 percent. In contrast, more oranges were salvaged for processing use, so its share increased slightly. With the sharply smaller lemon crop in California, fewer lemons were processed in 1978/79–only 34 percent of the crop, compared with more than half of the previous season.

The freeze damage also changed the pattern of citrus use in Texas in the 1978/79 season. Processing was up sharply for both oranges and grapefruit. Slightly more than 67 percent of the oranges were processed, while 56 percent of grapefruit were processed, up from 45 percent in 1977/78.

Citrus Fruit Production and Utilization



Beginning crop year indicated.

Table 5—Oranges and grapefruit processed, Florida 1976/77 through 1978/79

Crop and season	Frozen concentrates	Chilled products		Other processes[2]	Total processed
		Juice	Sections and salads		
	1,000 boxes				
Oranges:[1]					
1976/77	148,731	27,250	378	8,812	185,171
1977/78	132,222	25,345	382	8,077	166,026
1978/79[3]	130,171	22,781	315	6,549	159,816
Grapefruit					
1976/77	13,020	4,331	934	16,822	35,107
1977/78	13,999	4,363	917	14,083	33,362
1978/79[3]	13,276	3,162	771	13,001	30,210

[1] Includes tangelos, Temples, tangerines and K-early citrus. [2] Includes cannery juice, blend sections and salads. [3] Preliminary.

Source: Citrus production and utilization report, CRB, ESCS.

Frozen Concentrates

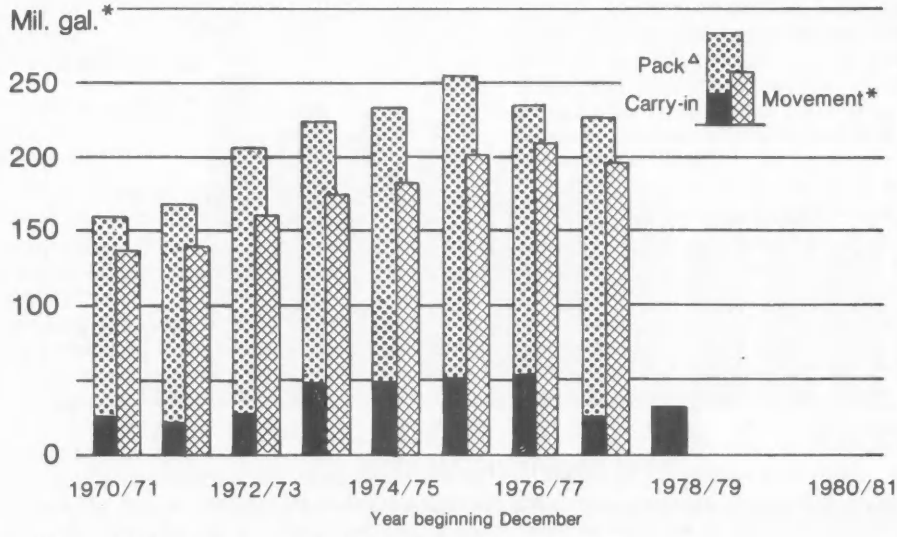
Florida's 1978/79 pack of FCOJ amounted to 173 million gallons, 7 percent above the previous season. The larger pack was due entirely to the higher juice yield. The packers recovered 1.34 gallons of 45 degree brix concentrate per box, compared with 1.23 gallons the preceding season. The larger pack combined with larger carryover and imports have resulted in total supply of FCOJ during the 1979/80 season substantially above the previous season.

F.o.b. prices of FCOJ have been steady at $3.55-$3.60 per dozen 6-ounce cans (unadvertised brand, Florida canneries)except for a promotional allowance to reduce prices to $3.25 for the shipments of FCOJ from April 16 through May 18. This compares with $3.30 a year ago. The promotional allowance had resulted in substantial improvement in movement. However, movement was slackening somewhat after the promotional allowance expired, but it has greatly improved in recent weeks. Consequently, shipments this season through October 13 amounted to 171.5 million gallons, up 10 percent from a year ago. But packers' stocks of FCOJ as of October 13 were still sharply above last season's levels. If movement continues at the relatively high level the carryover at the end of the season could be approximately 35 million gallons, compared with 31.9 million gallons last season. With the record Florida orange crop for 1979/80 in prospect the FCOJ pack is likely to be substantially larger and total supplies of FCOJ during the coming season will be large. Consequently, FCOJ prices can be expected to ease somewhat.

According to the Florida Citrus Processor Association, export shipments of FCOJ through October 13 amounted to 9.8 million gallons, up 13 percent from the corresponding period a year ago. Canada, our major customer, took more than half of the total. Exports are expected to increase this season as U.S. pack is expected to be larger.

In continuation of the uptrend, the 1978/79 Florida pack of frozen concentrated grapefruit juice (FCGJ) totaled 14.2 million gallons (excluding reprocessed gallons), up 4 percent from 1977/78. Because of a larger carryin at the beginning of the season, the total supply of FCGJ is also 4 percent larger. In response to continued good demand, the f.o.b. price have advanced to $2.80-2.85 per dozen 6-ounce cans (unadvertised brands, Florida canneries) from $2.60 at the beginning of the 1978/79 season. Movement so far this season through October 13 totaled 14.6 million gallons, up 26 percent from the corresponding period a year ago. Larger movement more than offset larger supplies—leav-

Florida Supply and Movement of Frozen Orange Juice Concentrate



* 45° Brix. △ Includes imports. Florida citrus processors association.

USDA

Neg. ESCS 5713-79 (9)

ing the stocks on-hand in mid-October 35 percent below a year ago. Even with a slightly larger Florida crop for 1979/80 in prospect, the total supply of FCGJ for 1979/80 is not expected to increase appreciably. Prices are likely to remain strong in view of good demand. However, substantially larger supplies of FCOJ may weaken the demand somewhat.

Chilled Products

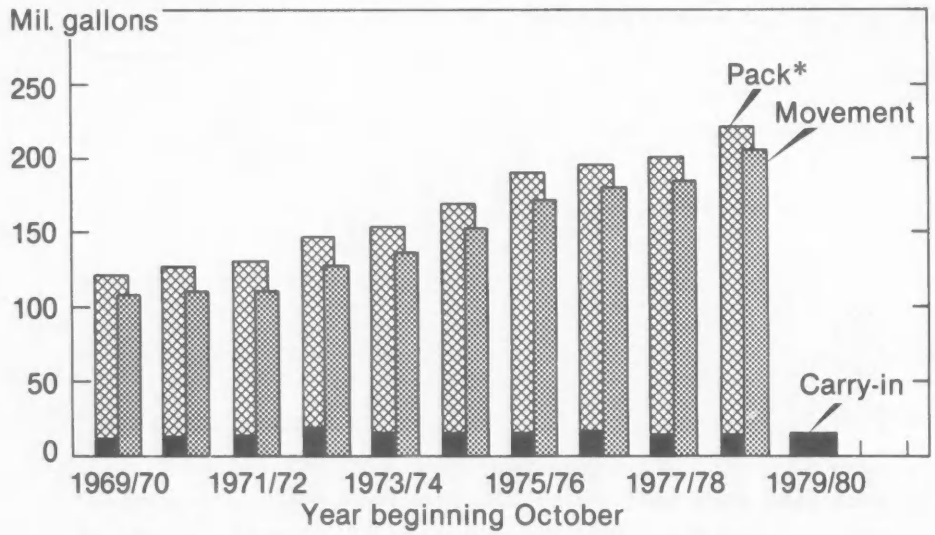
In response to increasing good demand, Florida's pack of chilled orange juice for the 1978/79 season reached another record 206.2 million gallons (excluding single-strength reprocessed), 11 percent more than last season. Total domestic movement also set a record of 201.2 million gallons, in spite of higher prices. Foreign demand also showed improvement with an increase of 7 percent from last season. However, the carryover at the end of the season, at 15.7 million gallons, was almost the same as a year ago. The record Florida orange crop will result in a substantially larger supply of chilled orange juice and prices are likely to ease with FCOJ.

In continuation of the uptrend, Florida's pack of chilled grapefruit juice for the 1978/79 season also set a record of 27.1 million gallons (excluding single-strength reprocessed), an increase of 6 percent from last season. Movement also shows a substantial increase, more than offsetting the larger pack and as a result, the carryover at the end of the season was substantially below year-earlier levels.

Canned Citrus

The total pack of canned citrus products in Florida for the 1978/79 season totaled 32.2 million cases (24-2's), up slightly from last season. However, movement was down slightly due primarily to a moderate decrease in movement of canned grapefruit juice. The slackening movement could be attributed to higher prices and a shift of consumer preference to frozen concentrated and chilled grapefruit juice. F.o.b. prices of single-strength canned grapefruit juice has been raised twice this season to $6.25 per case (1 dozen-46 ounces, unsweetened), compared with $5.25 a year ago. In contrast, movement of canned orange juice increased moderately from last season in spite of higher prices. The current list f.o.b. Florida cannery prices of single-strength canned orange juice

Florida Supply and Movement of Chilled Orange Juice



*Excluded single-strength reprocessed

Florida citrus processors association.

USDA

Neg. ESCS 2456-79 (10)

(unsweetened) quoted at $8.00 per case (1 dozen-46 ounces), has been reduced from the record level of $8.25 early in the season, but is still above $7.35 a year ago. The carryover of most canned citrus products at the end of the 1978/79 season was still slightly smaller than a year ago.

In view of the larger Florida citrus crops for the 1979/80 season in prospect, the total pack of canned citrus products is expected to increase. Thus, even with smaller inventories at the beginning of 1979/80, the total supply of canned citrus items will be ample. Prices may ease somewhat.

FRESH NONCITRUS

The 1979 noncitrus fruit crop is forecast at 12.2 million tons, only 4 percent above last year but 8 percent above 1977. Larger crops were estimated for all fruits except apples and tart cherries. Available supplies this fall and winter will be ample. Cold storage holding of most fresh noncitrus at the beginning of October were considerably larger than the comparable period a year ago. Pears, other than Bartletts, were the only fruit in smaller supply. However, prices are expected to be relatively firm.

Table 6—U.S. noncitrus fruit: Total production, 1977, 1978, and indicated 1979

Crop	1977	1978	1979
	1,000 tons		
Apples	3,336	3,817	3,791
Apricots	147	126	145
Cherries, sweet	148	155	192
Cherries, tart	105	91	86
Cranberries	105	123	126
Grapes	4,298	4,567	4,739
Nectarines	155	148	185
Peaches	1,492	1,351	1,462
Pears	787	727	803
Prunes and plums	727	643	664
Total	11,300	11,748	12,193

Source: Crop Production, CRB, ESCS.

Apples

Crop Down Slightly

The final forecast of the 1979 U.S. commercial apple crop placed production at 7.58 billion pounds, 1 percent below the August 1 forecast and last year's record crop. Prospects declined in all regions since August 1.

Apple crop prospects in the Eastern States show a mixed pattern. New York, the leading apple State in the East, expects a crop of 940 million pounds, down 13 percent from 1978. Pennsylvania with a crop of 505 million pounds, an increase of 26 percent, is the second largest apple State in the East. In the Central States, the sharp decrease in apple output is due to Michigan's reduced crop of 700 million pounds, 24 percent below 1978. Prospects in the Western States are still 7 percent above the 1978 harvest. Washington, the Nation's leading apple State, expects a record crop of 2.3 billion pounds, 6 percent above last year's crop. California and Oregon, the other two major apple States in the West, also expect larger crops.

Table 7—Apples: Regional production, 1977, 1978, and indicated 1979

Area	1977[1]	1978[1]	Indicated 1979
	Billion pounds		
East	2.72	3.19	3.13
Central States	1.01	1.40	1.21
West	2.94	3.04	3.24
Total U.S.	6.67	7.63	7.58

[1] Includes unharvested production and excess cullage (million pounds): United States 1977-29.6; 1978-52.2.

Source: Crop Production, CRB, ESCS.

Market Prospects and Prices

Shipments of fresh apples were running moderately behind last year's pace because of the late harvest. With a smaller crop, domestic use of apples for fresh market is likely to be below last year's level, while processing use is expected to exceed the 3.3 billion pounds used in 1978/79. Although the record orange crop may weaken demand for fresh apples, good processor demand is expected because of low inventories of canned and frozen apple items.

Opening f.o.b. prices for fresh apples at major shipping points were generally moderately to substantially higher than last year, but they have declined with increased volume. In mid-October, prices were still above year-earlier levels.

As supplies will continue to increase this fall, prices of fresh apples are likely to decline further. But prices are expected to hold relatively firm at levels slightly to moderately above last year with the support of foreign demand despite the downward pressure from the orange crop.

Exports prospects to Canada, one of our most important markets, are bright as apple production there is expected to decrease almost 8 percent from 1978. In addition, exports to the Far East and Middle East still look very encouraging. Hong Kong

Table 8—Red Delicious Apples: Shipping point prices, selected regions, 1978 and 1979

Shipping points	Mid-October F.O.B. prices		Units
	1978	1979	
Western Michigan	6.19	6.75	Per carton, U.S. Fancy, 2¼" up, 12-3 lb. film bags.
Appalachian District	7.00	8.50	U.S. Comb. Extra Fancy and Fancy, tray pack, 88-113's
Yakima Valley, Washington ..	9.00	9.25	Per carton, tray pack, Wash., State Extra Fancy, 80-125's.

Source: F.O.B. prices, AMS.

has become one of our major customers. Exports got off to a fast start this season. During the first 2 months of the 1979/80 season (July-August), larger exports of old crop were recorded for all areas with Canadian purchases up 27 percent and shipments to Hong Kong almost six fold more. A sharp increase was also recorded for European markets.

The smaller crop combined with the expected good demand from the major processors has strengthened the market for processing apples. Apple prices for processing have been negotiated at higher levels. The majority of the apple processors in Michigan have agreed to pay $6.15-$7.50 per hundredweight (cwt.) for processing variety apples, U.S. No. 1 canner grade, 2½ inches and up, delivered to processors, compared with $5.75-$7.25 a year ago. In California, apple processors are paying $170 per ton, f.o.b. packing house for all varieties except Red and Standard Delicious, 2⅜ inches and larger, compared with $150 a year ago. In the East, apple prices for processing use are also offered at moderately higher levels of $4.00-$6.25 per hundredweight in New York compared with $3.25-$6.00 last year.

Avocados

Smaller Crop Expected

The first estimate of the 1979/80 California avocado crop is 3 million bushels, 41 percent below 1978/79. This is the smallest crop since 1975/76, when only 2.3 million bushels were shipped. The cold weather this past winter and high winds this spring are the principal causes for the reduction. However, the continued increase in plantings of avocado trees points to a long-term upward trend in production. California avocado bearing acreage increased to 37.8 thousand acres in 1978/79 from 33.9 thousand acres in 1977/78. The 1978/79 shipments of fresh California avocados through September 29 has exceeded the previous season's total shipment. The estimated total avocado shipments during 1978/79 at 5.1 million bushels will be almost 20 percent larger than 1977/78.

The forecast of Florida avocados for the 1979/80 season is estimated at 1.2 million bushels. This will be the largest volume ever harvested, 9 percent larger than the 1.1 million bushels shipped in 1975/76, the previous record. Winds from hurricane David on September 2-3 did not hit the principal production area in sufficient strength to cause any serious damage to either the fruit or trees.

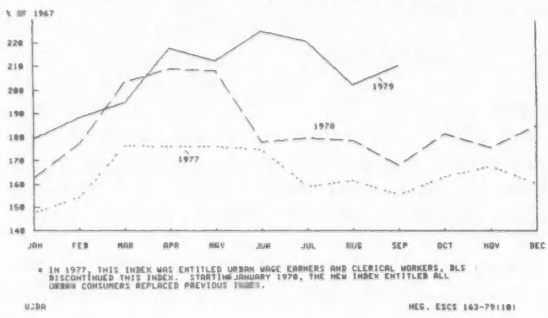
The record production in Florida can be traced to a sharp increase in new plantings during the past decade and excellent recovery from the freeze damage in mid-January of 1977. Florida avocado bearing acreage has steadily increased from 5,400 acres in 1971/72 to 7,700 acres in 1978/79, but yield has fluctuated widely from 59 bushels per acre in 1977/78 to 181 bushels in 1975/76 due mainly to weather variations. Production will probably continue its uptrend with the expected bearing acreage increasing at an annualal rate of 5 to 7 percent.

Florida shipments through September were 328,000 bushels, 43 percent above the corresponding period a year ago. In addition, this season's later maturing varieties are expected to have a much heavier crop. In response to the larger crop, f.o.b. prices for avocados at South Florida points have been substantially below last year's levels. In mid-October, shipping point prices for Florida avocados, Greenskin varieties, size 8-16, were quoted at $4.25 a flat, compared with $5.00 a year ago. The smaller California avocado crop may strengthen prices for Florida avocados somewhat.

Bananas

Moderately Larger Imports

U.S. imports of bananas during the first 8 months of 1979 totaled 1.6 million metric tons, up 6 percent from the comparable period a year ago. Honduras continues to be our top supplier as it recovers its banana production after hurricane Fifi's damage in 1974. Honduras provided almost



30 percent of our total imports, compared with 24 percent last year. Ecuador, our second major source provided us almost the same quantity of bananas as last year's. Imports from Costa Rica were down 12 percent from the corresponding period a year ago.

Retail prices for bananas have weakened this summer, reflecting larger supplies of summer fruits but are still substantially above a year ago. The prospective increase in banana supplies combined with larger supplies of citrus fruits could exert further downward pressure on retail prices for bananas.

Cherries

Record Sweet Cherry Crop

The Nation's sweet cherry crop was 192,400 tons, 24 percent above 1978 and 11 percent above the previous record crop produced in 1976. The increases were recorded for all the States except Michigan which was down 23 percent from last year. The crop totaled 148,700 tons in the three Pacific Coast States, 37 percent larger than 1978. Washington, the leading sweet cherry State produced 68,000 tons, up 15 percent from 1978. California, the second largest producer in 1979, increased production sharply to 42,700 tons, tripled from the 1978's small crop. Together, the two States accounted for 57 percent of total U.S. production.

Prices received by growers for the 1979 crop averaged $617 per ton, down from $692 a year earlier. Substantially lower prices were reported for all of the Western States except Montana. However, despite the largest crop in Pennsylvania since 1965, prices received by growers averaged substantially above year-earlier levels, reflecting fresh sales. In contrast, even with a sharply smaller crop in Michigan, grower prices averaged substantially lower.

The larger 1979 sweet cherry crop resulted in an increase of nearly one-fourth larger shipments to fresh markets, while movement to processors increased one-fifth. Larger fresh shipments are partly attributed to our increased exports to Japan.

Table 9—Sweet cherries: Production, utilization, price, and value, 1975-79 crops

Crop	Production[1]		Utilization				Price per ton	Value of utilized production
	Total	Utilized[2]	Fresh	Processed (fresh equivalent)				
				Canned	Brined	Other[3]		
	Thou. tons						*Dol.*	*Thou. dol.*
1975	151.9	151.9	77.5	8.9	60.3	5.2	407	63,484
1976	172.9	167.7	95.1	11.2	51.4	10.0	402	67,474
1977	147.8	146.5	72.4	10.5	52.1	11.5	496	72,686
1978	155.0	155.0	67.3	12.8	59.6	15.3	692	107,307
1979	192.4	192.3	84.4	12.2	87.5	8.2	617	118,540

[1] Difference between total and utilized is excess cullage and quantities not harvested for economic reasons. [2] Some totals do not add due to rounding. [3] Includes frozen, juice, jelly, etc.

Source: Crop Production, CRB, ESCS.

Table 10—Tart cherries: Production, utilization, price, and value, 1975-79 crops

Crop	Production[1]		Utilization				Price per ton	Value of utilized production
	Total	Utilized[2]	Fresh	Processed (fresh equivalent)				
				Canned	Frozen	Other[3]		
	Thou. tons						*Dollars*	*Thou. dollars*
1975[2]	145.2	123.1	3.6	40.8	74.6	4.1	204	25,088
1976	73.3	73.3	3.0	18.6	49.1	2.6	502	36,806
1977	105.4	105.4	3.1	30.1	69.6	2.6	588	61,949
1978	90.6	90.6	2.5	23.8	63.2	1.2	876	79,334
1979	86.4	86.4	2.2	19.0	52.3	12.9	944	81,524

[1] Difference between total and utilized is excess cullage and quantities not harvested for economic reasons. [2] 1975 tart cherry production, price and value of production include 1975 crop reserve pool quantities sold during 1975-76 market season. [3] Includes juices, wine, jam, etc.

Source: Crop Production, CRB, ESCS.

Smaller Tart Cherry Crop

The total U.S. production of tart cherries was 172.7 million pounds in 1979, 5 percent below the 1978 crop and 18 percent smaller than in 1977. Michigan, the leading State, produced only 102 million pounds compared with 128 million pounds last year. In contrast, production in New York, the second leading State, was 44 percent above a year earlier. Production was also up for most of the other States.

In response to the smaller crop, grower prices for the 1979 tart cherry crop averaged 47.2 cents a pound, 8 percent above a year ago. Higher prices were reported in each State and resulted in nearly a 3-percent increase in the value of utilized production.

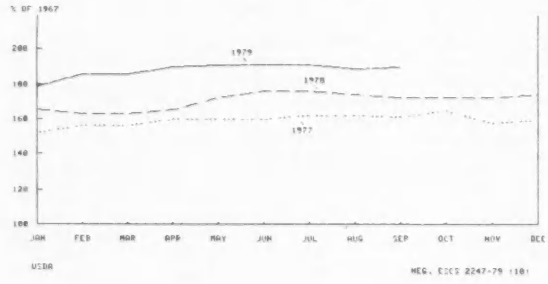
Cranberries

As of October 1, production of the Nation's cranberry crop was forecast at a record 2.52 million barrels (114,000 metric tons), a 2 percent increase since mid-August and 3 percent larger than the 1978 crop. Larger crops are expected for all producing States except Massachusetts.

Although prospects in Massachusetts, the leading cranberry State, improved 4 percent since mid-August to 1.12 million barrels, the crop is still 5 percent smaller than last year's crop. In contrast, Wisconsin, the No.2 cranberry State, expects to harvest 11 percent more cranberries.

F.o.b. prices for canned cranberry sauce have been moderately above year-earlier levels but declined slightly in September. The BLS wholesale price index for canned cranberry sauce (No. 300 can) averaged 189.0 (1967=100) for September 1979, 8 percent higher than last year. Even with a larger crop, prices for canned cranberry sauce are not expected to decline.

CANNED CRANBERRY SAUCE: BLS WHOLESALE PRICE INDEX



Grapes

Moderately Larger Crop

The final forecast of the U.S. grape crop places production at 4.74 million tons, 2 percent below the September 1 forecast but 4 percent above the 1978 crop. California now expects 4.30 million tons, 7 percent more than in 1978 as larger crops of table and raisin varieties more than offset smaller output of wine varieties. Production of wine varieties is forecast at 1.7 million tons, down slightly from last year's record crop.

The California grape bearing acreage in 1978 decreased slightly for the first time since 1973 with decreases recorded for all three classes. The estimated total grape bearing acreage in 1979 continued to decline. The estimated bearing acreage for wine grapes totaled 310,700 acres, compared with 313,700 in 1978 and that for table varieties is estimated at 61,200 acres, down from 62,200 acres in 1978. However, the estimated 1979 acreage for raisin varieties increased slightly. Trends for bearing acreage, production, and yield per acre for California grapes by variety, are shown in Table 11.

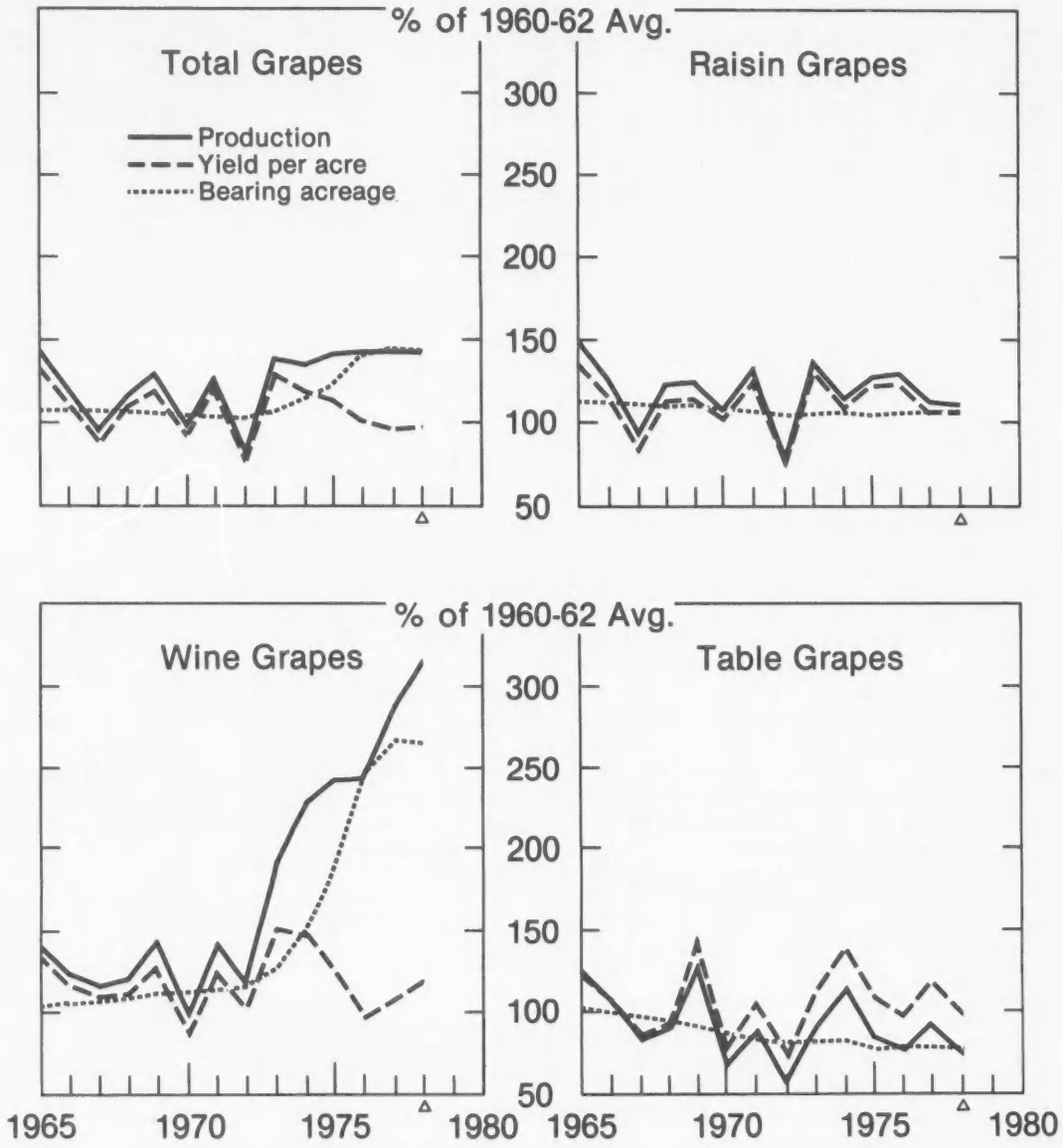
Total grape production from States other than California is now estimated at 438,800 tons, down one-fifth from 1978, reflecting mainly a sharply smaller crop in Washington. New York, the second largest grape-producing State, expects a crop of 170,000 tons, a tenth smaller than 1978. Production in Washington, the third largest grape-producing State at 95,000 tons, is down almost a half from 1978's large production as a result of extreme cold winter and hot July weather. Michigan's grape crop is also down moderately. Most of the crops from these States with exception of Arizona are Concord or other slip skin varieties, which are used largely for canned and frozen concentrated grape juice in addition to wine.

Market Prospects and Prices

Shipments of table grapes were moderately above last year's pace through mid-October but have declined seasonally in recent weeks. Demand for fresh grapes so far this season has been good, as total unloads through early October were almost 9 percent above last season. Consequently, shipping point prices for California Thompson seedless grapes in early October were above a year ago. Thompson seedless were selling at $11.75 per 23-pound lug in Kern District, California, $1.75 above the same time last year. Fresh grape prices are expected to remain firm as supplies will continue to decline.

With production of standard quality raisins increasing to the normal range after the rain damaged crop of a year earlier, the field prices for California raisin grapes have settled sharply lower than last year's unusually high levels. In early October, the Raisin Bargaining Association announced that the packers have accepted field prices for free tonnage natural Thompson seedless

California Grapes: Acreage, Yield and Production



△Preliminary

Table 11—Grapes: Total production and season average prices received by growers in principal States, 1977, 1978, and indicated 1979 production

State	Production[1]			Price per ton[4]	
	1977	1978	1979	1977	1978
	Tons			*Dollars*	
New York	101,000	188,000	170,000	234.00	245.00
New Jersey	1,000	([3])	([3])	233.00	([3])
Pennsylvania	30,000	57,500	57,000	231.00	232.00
Ohio	7,100	12,000	14,000	225.00	223.00
Michigan	33,000	67,500	62,000	216.00	206.00
Missouri	3,850	3,300	4,000	213.00	231.00
North Carolina	4,650	6,800	8,500	320.00	300.00
Georgia-South Carolina	4,850	5,100	6,800	225.00	228.00
Arkansas	9,600	8,200	8,000	232.00	247.00
Arizona	11,000	14,300	13,500	955.00	943.00
Washington	105,600	187,000	95,000	205.00	209.00
California:					
Wine	1,563,000	1,706,000	1,700,000	175.00	210.00
Table	488,000	393,000	400,000	269.00	342.00
Raisin	1,935,000	1,918,000	2,200,000	183.00	222.00
Dried[2]	248,300	228,500	---	840.00	1,001.00
Not dried	803,000	912,000	---	180.00	217.00
All	3,986,000	4,017,000	4,300,000	190.00	229.00
United States	4,297,750	4,566,700	4,738,800	194.00	231.00

[1] Includes unharvested production and excess cullage (tons): U.S. 1977-1,550 (248,000 tons fresh equivalent raisin type in California laid, but not harvested due to severe weather damage); 1978-248,900. [2] Dried basis, 1 ton of raisins is equivalent to 4.56 tons of fresh grapes for 1977 and 4.40 for 1978. [3] Discontinued after 1977. [4] Price derived from unrounded data for California all varieties and raisin varieties.

Source: Crop Production, CRB, ESCS.

at $1,150 per ton and Zante currents at $1,100 per ton. This compares with $1,600 per ton a year ago.

In response to the relatively large wine variety grape production, winery prices to growers of good quality grapes in California were generally below last year's levels. Prices varied greatly by producing areas, supplies, and varities of grapes. However, wine prices have been substantially above a year ago and in early October, regular and pale dry sherry was mostly $1.80-$1.85 a gallon compared with $1.40-$1.45 a year ago. If the economy continues to weaken and inventories of wine continue to grow, wine prices are expected to weaken.

Higher Levels of Drying and Crushing

Seasonal deliveries of raisins to handlers through October 13 totaled 201,749 tons, including 170,689 tons of natural seedless. This is well ahead of the quantities delivered from the rain damaged crop of a year earlier and the near 1977 normal crop. The larger raisin variety grape production has led to a larger quantity of raisins to handlers. Thus, even with a smaller carryover of raisins from last season, the larger pack will boost supplies of raisins.

Reported use of California grapes for crushing through October 8 was 2.2 million tons (fresh basis), up slightly from last year. The increase is primarily attributed to larger crushing of wine variety grapes even with larger inventories of wine in California as of June 30. Demand for wine continues good as per capita wine consumption for all adults continued to increase, reaching 3.04 gallons in 1978 up from 2.87 gallons in 1977 according to the Wine Institute. The further increase in wine consumption in 1979 is expected. However, the smaller grape crops this year in States other than California, especially the Great Lake States are expected to result in a decreased crush of Concord and other American-type grapes.

Pears

Pear Supplies Larger

The final forecast of the U.S. pear crop for 1979 is 803,100 tons, 10 percent larger than last year's small crop. Bartlett pear production for the three Pacific Coast States—at 562,000 tons—is up 20 percent from a year ago. Larger crops were forecast for all three States. Four-fifths of last season's Bartlett crop was canned.

The production of fall and winter pears in Washington and Oregon is expected to total 185,000 tons, 12 percent below last year's crop. The smaller production in Washington more than offset the 9-

percent increase in Oregon. These pears are the principal supplies for fresh market during winter and spring. Most of the remaining U.S. pear production is located in Michigan and New York where smaller crops are in prospect.

Substantially Lower Prices

Shipments of fresh pears from the Pacific Coast States have been running only moderately ahead of last year because the season was later. California's movement is down slightly, which could be caused by strong demand from processors, but larger shipments from Oregon and Washington are offsetting. A larger quantity of Bartletts for processing use is expected. However, f.o.b. fresh Bartlett prices in the West Coast have been sharply below year-earlier levels. In contrast, opening f.o.b. prices of winter pears were moderately higher than a year ago in response to the smaller crop. Prices are expected to remain firm throughout the season.

With the larger crop, growers and canners in the West Coast have agreed to field prices for Bartlett pears generally lower than a year ago. California growers and canners have agreed on a field price of $172.50 a ton for No. 1 grade Bartletts, compared with $182.50 last year. The Washington-Oregon Canning Pear Association and processors agreed on the price for No. 1 grade first at $170 per ton, roadside, with a 5 percent provisional cull tolerance, down from $185 per ton in 1978. Even with the lower contract prices, prices of canned pears are not expected to be below year-earlier levels. Higher processing and distribution costs are likely to lead to wholesale and retail price hikes. Cannery workers and packers in the West Coast have signed a three year contract for wage hikes and higher fringe benefits. Also, prices for tinplate continue to increase.

Table 12—Pears: Shipping point prices, selected regions 1978 and 1979

Shipping points	Mid-October F.O.B. prices		Units
	1978	1979	
Lake County Dist., California:			
Bartlett	---	11.25	US No. 1, std. box wrapped pack, 90-150's.
Yakima Vally Washington:			
Bartlett	10.50	8.95	Boxes, wrapped, US No. 1, 90-135's
D'Anjou	8.88	10.00	

Source: F.O.B. prices, AMS.

Exports

Generally, more than two-thirds of our pears are exported to Canada and Europe. Total fall and winter pear production there during 1979 is expected to be slightly smaller than a year ago. This could enhance our prospects for pear exports to these two areas this season. Exports of fresh pears during the first 2 months of the 1979/80 (July and August) amounted to 5,222 metric tons, 9 percent above the same period a year earlier.

PROCESSED NONCITRUS

Because of a larger noncitrus crop, the 1979/80 pack of most noncitrus fruit is likely to exceed that of a year ago. But total supplies of canned noncitrus fruit are not expected to increase appreciably because of smaller carryover stocks at the beginning of the season. Supplies of most dried fruits are expected to be up, particularly raisins. In contrast, frozen fruit supplies will probably be moderately smaller because of the sharp decrease in freezing tart cherries. Wholesale prices for most processed noncitrus will be firm as a result of higher costs of raw materials and processing, but those of raisins will be down sharply from last year's unusually high prices due to the sharply reduced pack.

Larger Canned Pack Expected

The 1979/80 pack of most canned noncitrus fruit is expected to be larger than last year reflecting larger noncitrus crop. Complete pack data so far this season indicate that the pack of canned apricot totaled 2.9 million cases (24 No. 2½'s), compared with 2.1 million cases last season. Thus, even with smaller carryin at the beginning of the season, total supply of canned apricots for the 1979/80 marketing season is still almost one-fifth larger.

The volume of clingstone peaches received by California processors this season totaled 694,254 tons, compared with 607,502 tons last year. Packers' receipts of Bartlett pears this season are expected to be more than 227,804 tons received last season because of a larger crop. With larger clingstone and Bartlett pear crops, the 1979 fruit cocktail pack is expected to be larger than last year. However, even with larger pack, supplies of these canned Clingstone peaches and fruit cocktail are not expected to increase appreciately because of

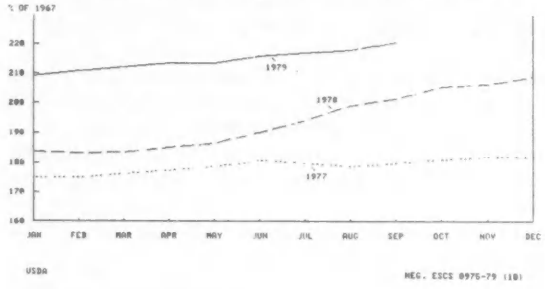
small carryover stocks, but total supplies of canned pears will be more.

Because of smaller crops in Michigan, the leading cherry producing State, total pack of canned cherries is expected to be smaller. However, according to the Northwest Food Processors Association, Northwest canners packed 324,701 cases (24/2½'s) of dark sweet cherries this year, two-thirds more than last year. The 1979 pack of canned light sweet cherries is at 179,981 cases (24/2½'s), up 6 percent from 1978. With smaller carryover and pack in prospect, the total supply of canned sweet cherries for the 1979/80 season will be smaller. In contrast, the total supply of canned tart cherries is expected to be ample, reflecting the sharply larger carryover at the beginning of the season.

Carryover stocks of canned apples and applesauce were smaller than a year ago, but the relatively large apple crop in several processing areas will assure adequate supplies of canned apple products. In addition, more apples are likely to be processed for canned apples and applesauce instead of crushing for juice as the carryover stocks of canned apple juice are well above a year-earlier levels.

In response to smaller supplies, wholesale prices of most canned fruit continued to advance. The September BLS wholesale price index for canned fruit reached a record high 220.6 (1967=100), almost 10 percent above a year ago. Prices for most canned fruit reflect the higher raw product costs and increased processing and marketing costs. The market will undoubtedly remain firm with retail prices advancing during the months ahead.

CANNED FRUIT: BLS WHOLESALE PRICE INDEX



Dried Fruit

Total supplies of dried fruits for the 1979/80 season are expected to be above that of last season. The Raisin Administrative Committee has estimated Thompson Seedless raisin production at 244,572 tons and Golden Seedless at 16,000 tons for the 1979/80 season, sharply above last season when rains severely damaged the raisin variety grapes. Including all other varieties, the total raisin production was placed at 283,000 tons. Total dried prune pack, the other major dried fruit item, is currently estimated at 130,000 tons, down slightly from last year.

Although the carryover of raisins is well below normal, total supplies of standard quality raisins during the 1979/80 marketing season are expected to be sharply larger. Consequently, raisin prices are offered at sharply lower levels than last year's unusually high prices. Foreign demand for raisins during 1979/80 looks promising. However, the major foreign raisin-producing countries are generally experiencing larger raisin supplies this season. Foreign raisin prices still remain at higher levels. Opening prices for U.S. raisins were lower.

The Raisin Administrative Committee has recommended to USDA that free and reserve percentage of 65 and 35 percent, respectively for natural seedless raisins and 56 and 44 percent, respectively for dipped raisins be established. Regulations under the Marketing Order require final percentages to be recommended by February 15, 1980.

According to the Prune Administrative Committee, the total supply of dried prunes for 1979/80 is expected to be 159,321 tons (processed condition), down slightly from 1978/79. Dried prune shipments lagged behind last year's during the first 2 months of 1979/80 (August-September) as prices still remain sharply above a year ago. Domestic shipments were down 31 percent and exports trailed those of last year by by 10 percent. France, an important customer for dried prunes expects a crop slightly larger than last year's good crop.

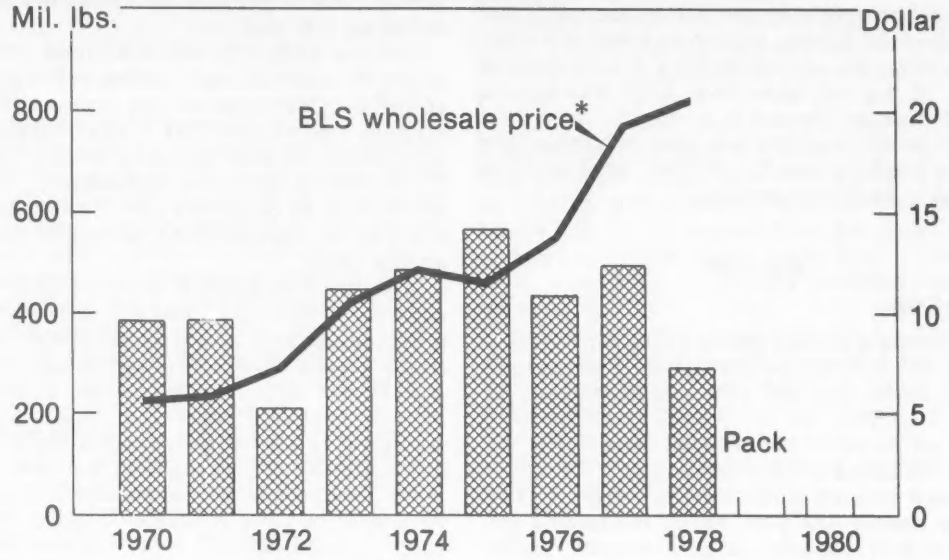
Because of the sharply larger supplies in prospect, the BLS September wholesale price of raisins have declined to $30.16 (15-ounce package, case of 24) from $34.50 in August. But it is still sharply above a year ago. Nevertheless, prices are likely to be lower than a year ago. Wholesale prices of dried prunes have remained steady at $17.28 (16-ounce package, case of 24) since last February. In view of the supply situation, wholesale prices of dried prunes are expected to remain relatively firm during the remainder of the marketing season.

Smaller Frozen Fruit And Berry Pack Expected

The 1979 U.S. pack of frozen deciduous fruit and berries is expected to be smaller than the 509 million pounds packed in 1978, primarily as a result of the considerably smaller pack of tart cherries. The total pack of frozen cherries was 104.6 million pounds in 1979, down 17 percent from a year earlier, reflecting a sharply smaller crop in Michigan.

Through late-September, freezers' receipts of blackberries from Oregon and Washington were

U.S. Raisin Pack and Wholesale Price



*15 oz. packages.

sharply below those of 1978. Deliveries of blueberries were also down slightly to sharply from last year in Oregon and Washington respectively, but up sharply in Michigan. Receipts of strawberry deliveries to California freezers totaled 129.1 million pounds through early-October, compared with 114.7 million a year ago. In addition, imports of frozen strawberries, mainly from Mexico, during the first 8 months of 1979 were also substantially more than the corresponding period a year earlier. Freezer receipts of strawberries in California were down sharply in the wake of hot weather in late September with only small deliveries expected during the remainder of the season.

Cold Storage Stocks Smaller

Cold storage holdings of frozen fruits and berries (excluding juices) on September 30 totaled 535 million pounds, 5 percent smaller than a year earlier. Substantial to sharp decreases in volumes of frozen apples, tart cherries, peaches and raspberries more than offset increases in blueberries and strawberries. Despite the larger stocks, wholesale prices of frozen strawberries have advanced in last three months. The September BLS wholesale price index of frozen strawberries at 217.9 (1967=100), was 16 percent above year-earlier levels. With the expected smaller supplies, wholesale prices for most frozen fruits will remain firm throughout the season.

Table 13—Stocks of frozen fruit: End of September, 1976-79

Frozen fruit	1976	1977	1978	1979
	Thousand pounds			
Apples	41,290	60,971	47,242	37,572
Apricots	14,850	16,149	15,062	13,744
Blackberries	16,213	14,745	12,515	11,705
Blueberries	36,079	33,656	41,112	45,466
Boysenberries	3,910	3,845	3,112	2,847
Cherries[1]	72,721	93,776	96,633	85,534
Grapes	3,571	6,231	5,905	5,565
Peaches	66,664	59,439	67,864	53,988
Raspberries[2]	21,905	21,767	19,218	15,375
Strawberries	141,804	206,439	162,524	171,380
Other frozen fruits	98,155	113,713	93,185	92,100
Total frozen fruits	517,162	630,731	785,014	898,546

[1] Includes both sweet and tart cherries. [2] Includes, red and black raspberries.

Source: Cold storage, CRB, ESCS.

Production Up Sharply

Current prospects for the four major edible tree nuts (almonds, filberts, pecans and walnuts) point to an estimated output of 632,175 tons (in-shell basis), 43 percent larger than 1978. Almond and Walnut crops are forecast to be sharply larger than the very small crops last year, while the pecan crop will be slightly smaller. Filbert production is expected to be sharply smaller.

Almonds

Record Crop

California's almond production is forecast at a record 350 million pounds, (kernel weight) 93 percent larger than last year's small crop and 12 percent more than the 1977 record crop. The large crop is attributed to the excellent condition of the trees in the spring and heavy bloom.

Foreign almond production is expected to be sharply smaller this year. Spain, the leading foreign producer, expects a crop 40 percent smaller than 1978. Italy, the second largest foreign producer, expects to harvest only 40 percent of last year's crop. If current production prospects are realized, the 1979 world almond crop will still be substantially larger than 1978 primarily because of the larger U.S. crop.

During 1978/79, world almond prices were sharply above a year earlier, reflecting small supplies. Currently foreign prices still remain strong. Prices paid for Italian shelled Bari unselected almonds amounted to $2.74 per pound (f.o.b. Italian ports) on September 21, 1979, compared with $1.80 a year ago. Foreign prices are expected to remain strong in view of the sharply smaller crops.

According to Almond Board of California, our exports of almonds got off to a slow start, reflecting the poor inventory situation. During the first 3 months of 1979/80 (July through September) U.S. export shipments amounted to 34.6 million pounds compared with 41.7 million a year ago. Domestic shipment also show a sharp decrease, down almost 33 percent from last year. Opening prices for almonds were moderately higher than a year ago. In view of smaller crops in Spain and Italy, foreign demand will be strong during the 1979/80 season. Thus, even with a record crop, almond prices are likely to remain firm throughout the marketing season. Regarding this season's

Table 14—Tree nuts: Production in principal States, 1977, 1978, and indicated 1979

Crop and State	1977	1978	Indicated 1979	Crop and State	1977	1978	Indicated 1979
	Tons	*Tons*	*Tons*		*Tons*	*Tons*	*Tons*
Almonds:				Pecans:			
California	249,000	142,700	276,025	North Carolina	1,000	2,000	1,500
				South Carolina	1,500	3,000	1,500
Filberts:				Georgia	44,000	67,500	35,000
Oregon	11,400	13,700	10,700	Florida	3,050	2,100	900
Washington	350	350	300	Alabama	16,000	11,000	3,500
2 States	11,750	14,050	11,000	Mississippi	5,500	5,000	1,250
				Arkansas	1,500	2,000	2,000
Walnuts, English:				Louisiana	15,500	4,500	14,500
California	192,000	160,000	220,000	Oklahoma	6,750	7,750	10,000
Oregon	500	(3)	(3)	Texas	16,000	13,000	47,500
2 States	192,500	160,000	220,000	New Mexico	7,500	7,500	7,500
				Total	118,300	125,350	125,150
Macadamia nuts:							
Hawaii	9,840	11,000	n.a.	Improved varieties[1]	68,950	82,250	51,500
				Native and seedling	49,350	43,100	73,650
				Total 4 tree nuts[2]	571,550	442,100	632,175

[1] Budded, grafted, or topworked varieties. [2] Excludes Macadamia nuts. [3] Estimates discontinued after 1977 crop.

n.a.—Data not available temporarily.

Source: Crop Production, CRB, ESCS.

market allocation, the Almond Board of California has recommended to the Secretary of Agriculture that 100 percent of the 1979 crop be declared salable.

Walnuts

Record Crop

The September 1 forecast for the 1979 walnut crop was 220,000 tons, an increase from the 210,000 tons forecast August 1. This is 38 percent more than last season's small crop and 15 percent above the 1977 harvest. The increase is mainly due to higher sets and increased bearing acreage. Weather has been favorable for good nut growth.

According to the Walnut Marketing Board, shipments of in-shell walnuts for the 1978/79 marketing year (August 1-July) total 106.2 million pounds, down 17 percent from the previous season. Exports decreased almost one-fourth, accounting for 56 percent of the total shipments. Movement to domestic markets declined 9 percent but the share increased from 40 percent to 44 percent in 1978/79. Higher prices were chiefly responsible for the sharp decrease in European purchases of U.S. walnuts. Shipments to Europe were down 45 percent from 1977/78. Major customers are West Germany, The Netherlands, United Kingdom and Canada. The sharpest decline was recorded for The Netherlands. Shell shipments totaled 76.8 million pounds, down almost one-fifth from the 1977/78 marketing season.

The 1979/80 marketing season got off to a slow start; shipments of both shelled and in-shell walnuts during the first 2 months of 1979/80 (August 1-September 30) were smaller than a year ago. However, the export market for our walnuts during the 1979/80 season is expected to be favorable, as the early reports indicate that foreign walnut production will not increase substantially. In addition, walnut prices are expected to be below last season's high levels. The Walnut Marketing Board has released proposed export sale prices for walnuts during the new crop year at levels moderately lower than a year ago. The Board has recommended to the Secretary of Agriculture that three-fourths of the 1979 walnut crop be made available to the domestic market and a quarter be held in reserve for export.

Filberts

Filbert Crop Down Sharply

Oregon and Washington filbert production in 1979 is forecast 11,000 tons as of October 1, 22 percent less than last year's crop and 16 percent below 1977. The cold winter and unfavorable weather conditions during pollination have lowered yields, but nut size is normal.

Foreign production of filberts is also likely to be down from 1978. Turkey, the largest producer, expects to harvest 290,000 metric tons, 5 percent smaller than a year ago. Turkey recently raised support prices of filberts by 86 percent. In Italy, filbert production in 1979 is forecast at 80,000 metric tons, down 20 percent from the high level reached in 1978. However, the 1979 filbert production in Spain, the third largest foreign producer, is expected to be moderately larger than a year ago. Thus, with major producing countries expecting reduced supplies, prices should remain firm throughout the active trading season.

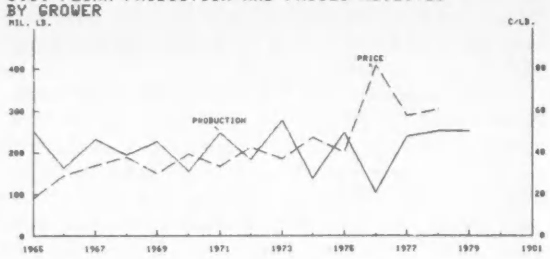
U.S. imports of shelled filberts mostly from Turkey during the first 8 months of 1979 amounted to 2,823 metric tons, up 17 percent from last year. Even with the smaller 1979 crop in the United States, imports of filberts may not increase appreciably in view of higher prices.

Pecans

Slightly Smaller Crop

Pecan production is forecast at 250 million pounds, 2 percent less than the September 1 forecast and slightly less than last year's crop. Declines from September in Alabama, Florida and Mississippi were caused by Hurricane Frederic. The Alabama crop is estimated to be 56 percent less than the September 1 estimate. Extensive damage was sustained in the Baldwin and Mobile County areas, where tree losses were about 80 percent. In southeast Mississippi trees received heavy damage resulting in crop loss about 37 percent from the September 1 estimates. Florida, a very small pecan producing State, lost almost 18 percent of the crop estimated in September. In contrast, the major producing areas in Georgia, benefited from the rainfall associated with the storm system. There the crop estimate is up 8 percent from the September 1 estimate. However, the Georgia crop is still forecast to be almost half of last year's. Consequently, Texas became a leading State with the production tripled from a year ago. Overall, production of improved varieties is expected to be down 37 percent which more than offset the 71 percent increase in native and seedling crop. Improved varieties are expected to account for 41 percent of this year's crop compared with 66 percent last year and 58 percent in 1977.

U.S. PECAN PRODUCTION AND PRICES RECEIVED BY GROWER



Carryover stocks of pecans at the beginning of the season were sharply larger than a year ago. As a result, the total supply of pecans will be larger this season because the 1979 production is only slightly smaller than 1978. Consequently, larger supplies plus larger crops of almonds and walnuts probably will keep grower prices below last year. Prices received by U.S. pecan growers in 1978 averaged 60.5 cents per pound for all varities, compared with 57.7 cents in 1977 and the record price of 81.5 cents per pound in 1976.

Table 15—Seven citrus fruits: Production, use, and value, United States, 1974/75 through 1978/79[1]

Fruit and season	Production[2]	Utilization of production				Value of production
		Fresh		Processed		
		Quantity	Percentage	Quantity	Percentage	
	1,000 tons		*Percent*	*1,000 tons*	*Percent*	*1,000 dollars*
Oranges:						
1974/75	10,241	2,151	21.0	8,090	79.0	653,759
1975/76	10,493	1,986	18.9	8,507	81.1	678,717
1976/77	10,546	1,854	17.6	8,692	82.4	811,196
1977/78	9,546	1,764	18.5	7,782	81.5	1,198,657
1978/79	9,156	1,599	17.5	7,557	82.5	1,355,623
Grapefruit:						
1974/75	2,504	1,145	45.7	1,359	54.3	154,439
1975/76	2,850	1,317	46.2	1,533	53.8	154,802
1976/77	3,032	1,141	37.6	1,891	62.4	175,467
1977/78	3,030	1,215	40.1	1,815	59.9	189,692
1978/79	2,746	1,145	41.7	1,601	58.3	218,739
Lemons:						
1974/75	1,118	438	39.2	680	60.8	113,226
1975/76	670	416	62.1	254	37.9	101,949
1976/77	988	497	50.3	491	49.7	92,500
1977/78	991	463	46.7	528	53.3	110,635
1978/79	737	453	61.5	284	38.5	134,089
Limes:						
1974/75	44	20	45.5	24	54.5	8,382
1975/76	43	23	53.5	20	46.5	10,012
1976/77	40	21	52.5	19	47.5	11,610
1977/78	18	13	72.2	5	27.8	8,791
1978/79	29	19	65.5	10	34.5	11,642
Tangelos:						
1974/75	212	107	50.5	105	49.5	12,361
1975/76	248	101	40.7	147	59.3	13,860
1976/77	216	103	47.7	113	52.3	13,296
1977/78	221	90	40.7	131	59.3	23,128
1978/79	189	77	40.7	112	59.3	22,176
Tangerines:						
1974/75	28	159	69.7	69	30.3	23,618
1975/76	236	160	67.8	76	32.2	25,976
1976/77	249	173	69.5	76	30.5	32,104
1977/78	228	137	60.1	91	39.9	35,560
1978/79	237	134	56.5	103	43.5	41,775
Temples:						
1974/75	239	86	36.0	153	64.0	14,575
1975/76	248	105	42.3	143	57.7	15,895
1976/77	171	53	31.0	118	69.0	12,882
1977/78	221	93	42.1	128	57.9	26,215
1978/79	212	97	45.8	115	54.2	30,456
Total:						
1974/75	14,586	4,106	28.2	10,480	71.8	980,360
1975/76	14,788	4,108	27.8	10,680	72.2	1,001,211
1976/77	15,242	3,842	24.7	11,400	75.3	1,149,055
1977/78	14,255	3,775	26.5	10,480	73.5	1,592,678
1978/79	13,306	3,524	26.5	9,782	73.5	1,814,500

[1] Preliminary. [2] Production having value.

Data prepared from citrus production and utilization reports, CRB, ESCS.

Table 16—Selected citrus fruit: Use for processing by percentages of total production, 1971/72 through 1978/79

State, variety, and season	1971/72	1972/73	1973/74	1974/75	1975/76	1976/77	1977/78	1978/79[1]
	Percent							
ORANGES:								
Florida:								
Temple	66.4	52.1	63.7	64.0	57.7	68.8	58.2	54.6
Early and midseason	91.2	92.6	93.4	92.3	93.4	94.7	93.5	93.0
Valencia	92.4	93.0	93.2	92.2	93.6	96.2	94.7	92.6
Total	91.8	92.8	93.3	92.3	93.5	95.2	94.1	92.9
California:								
Navel and miscellaneous	25.6	33.2	20.5	27.2	27.2	24.7	24.0	31.3
Valencia	48.7	50.4	35.7	43.5	44.5	32.5	39.8	37.2
Total	36.8	42.8	27.5	35.3	35.2	28.1	32.4	33.9
GRAPEFRUIT:								
Florida:								
Seedless	53.6	52.4	51.2	50.1	50.9	61.5	58.2	53.8
Pink	36.5	38.0	35.7	33.5	31.2	47.8	37.6	28.3
White	62.4	59.5	58.5	57.5	60.0	67.2	68.6	65.4
Other seeded	97.4	97.2	98.6	98.0	98.6	99.3	99.0	99.0
Total	63.7	62.4	61.1	57.9	58.5	68.2	64.9	60.4
Texas	37.6	46.3	49.5	36.3	32.1	47.7	44.5	55.6
TANGERINES:								
Florida	30.4	32.7	26.6	28.7	30.5	29.8	40.6	46.0
California	40.5	45.0	26.5	37.0	38.5	33.0	51.2	34.5
LEMONS:								
California	39.0	48.3	36.9	56.8	37.1	47.6	51.2	34.2
Arizona	57.5	59.4	40.2	73.3	43.2	58.2	60.3	49.1

[1] Preliminary.

Data prepared from citrus production and utilization reports, CRB, ESCS.

Table 17—Florida oranges used for frozen concentrate

Crop year	Florida orange and Temple production	Used for frozen concentrates		Yield per box
	Million boxes	*Million boxes*[1]	*Percent*	*Gallons*[3]
1974/75	178.6	135.5	75.9	1.31
1975/76	186.7	144.5	77.4	1.29
1976/77	190.6	148.7	78.0	1.07
1977/78	172.7	132.2	76.5	1.23
1978/79	168.7	130.2	77.2	1.34
1979/80	205.4	N.A.	N.A.	[2]1.30

[1] Includes tangelos, Temples, tangerines, and K-early citrus. [2] Estimated. N.A.-Not available. [3] 45-degree brix.

Source: Crop Production, CRB, ESCS.

Table 18—Citrus fruit: Season average equivalent returns per box received by growers, by variety and utilization, by State and total United States, 1976/77-1978/79 seasons

Variety, States and U.S.	1976/77						1977/78						1978/79					
	Equivalent P.H.D.[1]			Equivalent on-tree			Equivalent P.H.D.[1]			Equivalent on-tree			Equivalent P.H.D.[1]			Equivalent on-tree		
	All	Fresh	Proc.	All	Fresh	Proc.	All	Fresh	Proc.	All	Fresh	Proc.	All	Fresh	Proc.	All	Fresh	Proc.
	Dollars																	
ORANGES:																		
Florida:																		
Early and midseason	2.99	2.75	3.00	1.89	1.65	1.90	5.15	5.85	5.10	3.90	4.60	3.85	6.13	6.60	6.10	4.78	5.25	4.75
Valencia	3.73	4.55	3.70	2.63	3.45	2.60	5.65	6.45	5.60	4.40	5.20	4.35	6.63	6.95	6.60	5.28	5.60	5.25
All	3.27	3.30	3.27	2.17	2.20	2.17	5.39	6.10	5.34	4.14	4.85	4.09	6.35	6.76	6.32	5.00	5.41	4.97
Temple	3.39	4.25	3.00	2.16	3.05	1.75	5.35	6.40	4.60	3.92	5.00	3.15	6.48	7.30	5.80	4.95	5.80	4.25
California:																		
Navel and misc.	3.66	4.78	.26	2.42	3.54	-.98	5.99	7.74	.44	4.75	6.50	-.80	7.49	10.40	1.10	5.68	8.40	-.30
Valencia	3.94	5.38	.96	2.64	4.08	-.34	5.76	8.21	2.05	4.52	6.97	.81	6.93	9.52	2.56	5.05	7.42	1.06
All	3.78	5.03	.61	2.52	3.76	-.66	5.87	7.96	1.49	4.63	6.72	.25	7.24	10.03	1.81	5.40	7.99	.36
U.S.[2]	3.34	4.48	3.06	2.21	3.29	1.96	5.45	7.20	5.00	4.21	5.98	3.76	6.44	8.75	5.90	5.01	6.97	4.55
GRAPEFRUIT:																		
Florida:																		
Seedless	2.60	3.50	2.03	1.66	2.60	1.07	2.73	3.35	2.28	1.68	2.35	1.20	3.46	4.30	2.73	2.31	3.20	1.55
Seeded	2.10	([3])	2.10	1.20	([3])	1.20	2.45	([3])	2.45	1.45	([3])	1.45	2.60	([3])	2.60	1.50	([3])	1.50
All	2.51	3.50	2.05	1.58	2.60	1.10	2.68	3.35	2.32	1.64	2.35	1.25	3.33	4.30	2.70	2.19	3.20	1.54
Texas	1.88	2.43	1.27	1.34	1.88	.74	1.58	1.85	1.24	.95	1.22	.62	1.96	2.72	1.36	1.26	2.00	.66
California	2.29	3.84	.38	1.38	2.90	-.49	3.48	6.35	.22	2.24	4.80	-.66	4.86	7.92	.58	3.59	6.66	-.68
Arizona	1.79	3.30	.40	.99	2.50	-.40	1.34	3.10	.16	.44	2.20	-.74	2.89	5.54	.58	1.69	4.34	-.62
U.S.	2.35	3.30	1.77	1.49	2.47	.88	2.54	3.45	1.92	1.55	2.46	.93	3.26	4.55	2.33	2.17	3.49	1.22
LEMONS:																		
California	3.65	6.10	.95	1.75	4.20	-.95	4.57	8.47	.86	2.67	6.57	-.104	8.06	11.74	.99	5.86	9.43	-.99
Arizona	3.17	6.25	.95	1.27	4.35	-.95	3.08	6.50	.84	.88	4.30	-1.36	4.01	6.90	1.02	1.73	4.34	-.98
U.S.	3.56	6.12	.95	1.66	4.22	-.95	4.24	8.10	.86	2.27	6.14	-1.12	6.91	10.61	1.00	4.69	8.24	-.99
TANGERINES:																		
Florida	5.26	6.50	2.35	3.29	4.60	.20	6.90	8.65	4.35	4.79	6.60	2.15	6.69	8.80	4.20	4.42	6.60	1.85
California	5.87	8.40	.74	4.52	7.05	-.61	6.32	10.20	.84	4.97	8.85	-.51	10.26	15.10	1.05	8.51	13.20	-.40
Arizona	6.25	8.20	.75	4.90	6.85	-.60	7.72	10.90	.85	6.37	9.55	-.50	7.74	13.90	1.05	5.91	11.00	-.45
U.S.	5.56	7.28	1.64	3.86	5.61	-.15	6.84	9.35	2.98	5.02	7.58	1.16	7.74	11.08	3.25	5.64	8.98	1.16
TANGELOS:																		
Florida	2.77	2.85	2.70	1.42	1.55	1.33	4.72	5.20	4.40	3.29	3.80	2.95	5.28	6.40	4.50	3.75	4.90	2.95
LIMES:																		
Florida	11.61	20.50	2.20	8.60	17.15	-.45	19.11	24.95	2.55	15.72	21.35	-.25	16.17	23.00	2.40	12.44	19.00	-.80

[1] P.H.D.—Packing-house door. [2] Excludes Temples. [3] Fresh sales insignificant.

Source: Agricultural Prices, CRB, ESCS.

Table 19—Frozen concentrated citrus juices: Florida canners' stocks, packs, imports, supplies and movement, current season with comparisons

Item and season	Carryin	Pack		Imports and other supply		Supply		Movement		Stocks[1]
		To date[1]	Total season	To date[1]	Total season	To date[1]	Total season	To date[1]	Total season	
	1,000 gallons									
Orange:										
1977/78	25,256	161,204	161,204	25,420	39,245	186,624	225,705	171,211	180,206	45,667
1978/79	30,909	173,053		36,420		240,382		180,029		60,353
Grapefruit:										
1974/75	4,897	7,847	7,847	—	—	12,744	12,744	7,471	8,509	5,273
1975/76	4,235	9,316	9,316	144	211	13,695	13,762	9,295	10,456	4,400
1976/77	3,306	11,258	11,258	1,146	1,158	15,710	15,722	10,456	11,643	5,254
1977/78	3,854	13,693	13,693	355	355	17,902	17,902	11,589	13,665	6,313
1978/79	4,237	14,243		181		18,661		14,553		4,107
Tangerine:										
1974/75	399	1,147	1,147	—	—	1,546	1,546	1,065	1,153	481
1975/76	393	1,111	1,111	15	15	1,519	1,519	1,086	1,137	433
1976/77	382	926	926	21	21	1,329	1,329	762	1,041	567
1977/78	288	1,672	1,672	—	—	1,960	1,960	1,372	1,498	587
1978/79	462	1,367		17		1,846		1,194		652

[1] For the 1978/79 season, week ending October 13; 1977/78 October 14; 1976/77 October 15; 1975/76; October 16, and 1974/75 October 18. These respective dates include data through the 45th week of each season.

Source: Florida Citrus Processors Association.

Table 20—Chilled citrus products: Packs, stocks, supply, and movement, Florida, 1974/75 through 1978/79

Item and season[1]	Beginning stocks	Pack[2]	Total supply	Season movement	Ending stocks
	1,000 gallons				
Orange juice, s.s.:					
1974/75	16,386	154,478	170,864	154,085	16,779
1975/76[3]	16,779	174,804	191,583	173,558	18,025
1976/77	18,025	178,685	196,710	180,903	15,807
1977/78	15,807	184,966	200,773	185,088	15,685
1978/79	15,685	206,184	221,869	206,149	15,721
Grapefruit juice, s.s.:					
1974/75	1,681	20,535	22,216	20,768	1,448
1975/76[3]	1,448	24,538	25,986	24,583	1,403
1976/77	1,403	25,074	26,477	25,111	1,366
1977/78	1,366	25,460	26,826	24,921	1,906
1978/79	1,906	27,132	29,037	27,597	1,440
Grapefruit sections:					
1974/75	441	1,634	2,075	1,737	338
1975/76[3]	338	1,787	2,125	1,891	234
1976/77	234	2,095	2,329	1,982	347
1977/78	347	1,636	1,983	1,676	307
1978/79	307	1,642	1,949	1,727	222
Orange sections:					
1974/75	247	791	1,038	920	118
1975/76[3]	118	1,126	1,244	1,027	217
1976/77	217	797	1,014	827	187
1977/78	187	860	1,047	716	331
1978/79	331	657	988	633	355
Citrus salad:					
1974/75	886	3,465	4,351	3,724	627
1975/76[3]	627	4,027	4,654	3,599	1,055
1976/77	1,055	2,532	3,587	2,098	489
1977/78	489	2,945	3,434	2,611	823
1978/79	823	2,392	3,215	2,436	779

[1] Season beginning approximately October 1. [2] Packs of chilled juices include products of fresh fruit and frozen concentrate and excludes reprocessed single strength bulk. [3] 1975/76 season incorporates 53 weeks.

Source: Florida Citrus Processors Association.

Table 21—Canned citrus juices and fruit: Florida canners' stocks, packs, supplies, and movement, current season with comparisons

Item and season	Beginning stocks	Pack	Supply	Movement	Ending stocks
	1,000 cases, 24 No. 2's				
Juices[2]					
Orange:					
1974/75	2,639	10,737	13,376	11,349	2,027
1975/76[3]	2,027	10,635	12,662	10,746	1,916
1976/77	1,916	10,767	12,683	10,592	2,091
1977/78[5]	2,091	11,654	13,745	11,865	2,074
1978/79	2,074	13,222	15,296	12,678	2,618
Grapefruit:[4]					
1974/75	6,033	16,394	22,427	18,520	3,907
1975/76[3]	3,907	18,926	22,833	19,151	3,682
1976/77	3,682	18,809	22,491	17,769	4,722
1977/78	4,722	17,246	21,968	18,407	3,561
1978/79	3,561	16,764	20,325	17,295	3,030
Blend:					
1974/75	482	1,493	1,975	1,699	276
1975/76[3]	276	1,687	1,963	1,566	397
1976/77	397	1,308	1,705	1,517	188
1977/78	188	1,664	1,852	1,487	364
1978/79	364	1,255	1,619	1,365	254
Tangerine:					
1974/75	6	12	18	17	1
1975/76[3]	1	19	20	20	([6])
1976/77	([6])	35	35	20	15
1977/78	15	8	23	21	2
1978/79	2	19	21	18	4
Canned fruits:					
Grapefruit sections:					
1974/75	705	2,236	2,941	2,027	914
1975/76[3]	914	1,602	2,516	1,906	610
1976/77	610	1,722	2,332	1,950	382
1977/78	382	1,753	2,135	1,842	293
1978/79	293	1,823	2,116	2,002	114
Orange sections:					
1974/75	9	18	27	19	8
1975/76[3]	8	26	34	17	17
1976/77	17	10	27	21	6
1977/78	6	16	22	17	4
1978/79	4	15	19	15	4
Citrus salad:					
1974/75	31	206	237	152	85
1975/76[3]	85	112	197	126	71
1976/77	71	84	155	124	31
1977/78	31	111	142	114	29
1978/79	29	76	105	80	25

[1] Season beginning approximately October 1. [2] Single strength. [3] 1975/76 season incorporates 53 weeks. [4] "Reconstituted canned grapefruit juice", which previously has been reported separately, is now included with "grapefruit juice". [5] "Reconstituted canned orange juice", which has never been included in the Association's statistics, is now included with "orange juice". Adjustments in beginning stocks, movement, pack and goods-on-hand of orange juice and grapefruit juice were necessary because of the changes in the reporting procedure. [6] Less than 500 cases.

Table 22—Canned noncitrus fruit and juice: Canners' carryin, pack, supplies, and shipments, current season with comparisons

Item and season[1]	Carryin	Pack	Total supply	Total season shipments
		1,000 equivalent cases, 24 No. 2½'s		
Apricots:[2]				
1975/76	236	4,421	4,657	3,124
1976/77	1,534	2,387	3,921	3,051
1977/78	870	2,269	3,139	2,687
1978/79	452	2,127	2,579	2,312
1979/80	267	2,887	3,154	
Pineapple:				
1975/76	4,174	14,852	19,026	13,589
1976/77	5,437	17,270	22,707	15,709
1977/78	6,998	18,424	25,421	16,902
1978/79	8,520	18,349	26,869	17,902
1979/80	8,966			
		1,000 equivalent cases, 24 No. 2's		
Canned juice:				
Single strength pineapple:				
1975/76	2,116	8,713	10,829	8,594
1976/77	2,235	10,205	12,440	9,614
1977/78	2,826	11,977	14,803	11,356
1978/79	3,447	11,336	14,783	11,659
1979/80	3,124			
		1,000 equivalent cases, 6 No. 10's		
Concentrated pineapple:				
1975/76	389	911	1,300	1,043
1976/77	257	1,157	1,414	980
1977/78	437	1,319	1,756	1,268
1978/79	488	1,353	1,841	1,273
1979/80	568			

[1] Season beginning June 1. [2] California only.

Source: Canners League of California, and Pineapple Growers Association of Hawaii.

Table 23—U.S. wholesale prices of selected dried and frozen fruit items, by months, 1975-79

Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
	Dollars per cases											
DRIED FRUIT:												
Prunes												
(24-1 lb. pkg.):												
1975	9.571	9.571	9.571	9.490	9.049	9.049	8.575	8.575	8.575	8.575	8.575	8.673
1976	8.526	8.428	8.526	8.918	8.918	9.065	9.065	9.424	9.424	9.914	9.914	9.914
1977	10.274	10.274	10.274	10.355	10.355	10.355	10.355	10.486	10.486	11.286	11.629	11.629
1978	11.793	11.858	11.858	11.858	11.923	11.923	11.989	11.989	12.609	13.132	15.321	15.321
1979	15.321	17.281	17.281	17.281	17.281	17.281	17.281	17.281	17.281			
Raisins												
(24-15 oz. pkg.):												
1975	11.650	11.650	11.650	11.527	11.282	11.282	11.282	11.282	11.282	11.527	11.650	11.650
1976	11.748	11.748	11.870	11.870	11.870	11.993	11.993	11.993	11.993	15.741	20.580	20.825
1977	20.825	20.825	20.825	20.825	20.825	20.335	19.845	20.090	20.090	16.048	16.109	16.109
1978	15.925	15.680	15.680	15.864	16.109	16.268	16.268	17.640	17.824	28.690	35.525	35.525
1979	35.525	34.931	34.913	34.913	34.913	34.913	34.913	34.300	30.160			
FROZEN FRUIT:												
Strawberries												
(12-10 oz. pkg.):												
1975	4.219	4.219	4.219	4.218	4.218	4.218	4.218	4.218	4.218	4.285	4.285	4.285
1976	4.285	4.285	4.285	4.407	4.407	4.407	4.648	4.648	4.648	4.679	4.679	4.679
1977	4.679	4.730	4.730	4.730	4.730	4.730	4.813	4.936	4.936	4.936	4.936	4.936
1978	4.936	4.941	5.076	5.076	5.076	5.076	5.076	5.113	5.187	5.271	5.271	5.234
1979	5.234	5.267	5.267	5.271	5.271	5.271	5.698	5.808	6.016			
FROZEN JUICE:												
Orange, conc.												
(12-6 oz. cans):												
1975	2.244	2.254	2.254	2.254	2.254	2.254	2.246	2.246	2.246	2.358	2.383	2.383
1976	2.383	2.352	2.352	2.383	2.383	2.383	2.187	2.187	2.187	2.187	2.187	2.089
1977	2.040	2.776	2.752	2.752	2.752	2.910	2.910	3.101	3.223	3.223	3.459	3.508
1978	3.508	3.508	3.514	3.514	3.514	3.514	3.514	3.514	3.514	3.514	3.649	3.787
1979	3.787	3.787	3.787	3.787	3.787	3.787	3.787	3.787	3.787			

Source: Bureau of Labor Statistics, Department of Labor.

Table 24—U.S. monthly average price indexes for fruit

Item	1978					1979								
	Annual	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.
	(1967=100)													
Wholesale price index:														
Fresh fruit	217.6	241.2	265.6	230.5	219.7	201.0	219.9	226.4	238.0	234.1	232.9	238.6	262.6	237.3
Citrus fruit	196.1	228.1	294.2	174.0	192.6	182.0	172.3	190.0	208.7	212.1	216.3	291.5	341.2	336.3
Other fruit	225.9	245.4	250.4	254.8	230.6	208.3	240.2	241.4	249.7	242.4	238.9	212.4	224.3	189.9
Dried fruit	355.3	317.5	472.3	574.3	575.4	579.3	579.7	578.6	578.6	584.0	578.6	578.6	572.5	557.9
Canned fruit and juice	213.9	220.0	222.3	227.9	231.2	231.7	233.1	234.3	236.3	237.0	238.3	239.3	240.5	245.7
Canned fruit	193.8	201.4	205.4	206.0	208.7	209.3	210.9	212.1	213.8	213.6	215.8	217.0	218.0	220.6
Canned fruit juice	246.3	250.4	250.3	263.2	267.4	267.7	268.9	270.1	272.4	274.5	274.5	275.3	276.9	286.0
Frozen fruit and juice	232.0	230.6	231.1	238.7	246.2	246.2	246.4	246.4	246.5	246.5	246.5	249.1	249.8	251.1
Consumer price index:														
Fresh fruit	220.9	248.2	244.4	215.9	202.5	209.1	217.5	226.2	237.1	249.6	266.0	278.2	286.9	271.6
Index of fruit prices received by growers[1]	227	279	247	213	207	212	229	230	220	240	255	274	278	217

[1] Index for fresh and processed.

Table 25—U.S. monthly average fruit prices received by growers

Commodity and unit	1978				1979								
	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.
Apples for fresh use (cents/lb.)	15.8	13.6	13.9	13.7	13.6	14.0	14.2	14.0	13.9	13.5	14.9	15.6	15.8
Pears for fresh use ($/ton)	258.0	245.0	241.0	231.0	206.0	222.0	290.0	363.0	501.0	505.0	-	258.0	241.0
Peaches for fresh use (cents/lb.)	18.6	—	—	—	—	—	—	—	—	17.4	13.7	15.1	13.5
Strawberries for fresh use (cts./lb.)	37.2	62.7	37.4	—	61.8	79.0	55.6	39.8	33.4	38.3	48.3	46.3	
Oranges for: ($/box)[1]													
fresh use	11.48	4.44	2.54	2.12	2.42	2.63	3.14	4.01	5.14	8.73	10.76	10.16	6.81
Processing	.81	.81	3.40	3.93	4.42	4.83	4.54	4.46	5.07	5.28	1.06	1.06	1.06
All	6.25	5.73	5.07	4.55	4.66	5.10	5.17	4.86	5.34	5.64	4.64	4.96	3.52
Grapefruit for: ($/box)[1]													
fresh use	9.84	9.69	6.86	6.55	6.92	7.16	7.09	6.81	6.93	8.02	6.99	7.00	5.90
Processing	-.70	-.10	.64	1.04	1.05	1.28	1.62	1.71	.99	-.69	-.80	-.80	-.80
All	7.74	3.85	1.62	1.53	1.55	1.73	2.07	2.73	3.52	5.18	6.06	5.42	3.49
Lemons for: ($/box)[1]													
Fresh use	10.14	10.04	4.48	4.23	4.68	4.66	5.16	6.07	8.63	10.72	20.52	27.42	16.38
Processing	-1.05	-1.05	-.99	-.99	-.98	-.98	-.99	-.99	-.87	-.99	-1.00	-.70	-.70
All	6.34	4.81	2.14	1.84	2.01	1.84	2.41	3.19	5.45	8.35	17.62	23.63	11.74
Tangerines for: ($/box)[1]													
Fresh use	-	8.70	8.83	7.07	8.97	12.61	13.08	10.72	9.40	.00	.00	-	-
Processing	-	-.85	-.35	1.62	2.06	1.36	-.41	-.41	-.42	-.40	-.40	-	-
All	-	6.52	6.19	5.24	4.89	6.48	7.16	5.12	2.55	.40	.40	-	-

[1] Equivalent on-tree returns.

Source: Agricultural Prices, ESCS-SRS.

Table 26—Fresh fruit: Retail prices, marketing margin, and grower and packer return per pound, sold in New York City, seasonal average, 1976/77-1978/79.

Commodity and season	Retail price (cents)	Marketing margin		Grower and packer return[1] (f.o.b. shipping point price)[2]	
		Cents	Percentage of retail price		
Apples, Eastern Delicious:					
1978/79	34.6	13.8	40	20.8	60
1977/78	37.9	16.4	43	21.5	57
1976/77	34.8	15.4	44	19.4	56
Apples, Eastern McIntosh:					
1978/79	31.0	15.7	51	15.3	49
1977/78	40.5	24.1	60	16.4	40
1976/77	37.8	19.2	51	18.6	49
Grapes, Emperor:					
1978/79	85.6	52.1	61	33.5	39
1977/78	72.4	42.8	59	29.6	41
1976/77	64.1	36.9	58	27.2	42
Grapefruit, Florida:					
1978/79	33.2	26.1	79	7.1	21
1977/78	21.3	15.4	72	6.1	28
1976/77	22.1	15.5	70	6.6	30
Lemons, Western:					
1978/79	86.0	58.8	68	27.2	32
1977/78	54.1	34.6	64	19.5	36
1976/77	44.5	28.7	64	15.8	36
Oranges, California Navel:					
1978/79	58.6	40.0	68	18.6	32
1977/78	39.4	24.8	63	14.6	37
1976/77	28.5	18.1	64	10.4	36
Oranges, California Valencia:					
1978	43.3	27.0	62	16.3	38
1977	30.2	18.5	61	11.7	39
1976	28.7	18.6	65	10.1	35
Oranges, Florida:					
1978/79	30.5	18.9	62	11.6	38
1977/78	23.0	12.2	53	10.8	47
1976/77	20.5	13.6	66	6.9	34

[1] exceeds retail unit. [2] Production area and season: Apples, Eastern Delicious-*New York State* (Oct.-May); Apples, Eastern McIntosh-*New York State* (Nov.-May); Grapes, Emperor-*California* (Oct.-Apr.); Lemons-*California* (Aug.-July); *California*-Navel Oranges (Dec.-May); *California* Valencia, Oranges (May-Nov.); Florida Oranges-(Nov.-May).

Table 27—U.S. exports of selected dried fruits and tree nuts by destination, 1974/75-1978/79 seasons

Item and season[1]	Canada	Europe				Other	Total[3]
		United Kingdom	EC[2]	Other	Total[3]		
	Metric tons						
Prunes:							
1974/75	4,752	3,675	17,218	11,004	31,897	6,504	43,154
1975/76	4,140	3,278	27,061	15,072	45,411	9,438	58,989
1976/77	4,193	2,100	18,570	14,013	34,684	8,913	47,789
1977/78	3,756	2,565	29,922	9,468	41,955	8,138	53,849
1978/79	3,269	1,952	19,291	8,959	30,202	9,491	42,962
Raisins:							
1974/75	7,218	6,698	5,701	8,987	21,386	21,606	50,210
1975/76	8,660	7,859	6,206	12,823	26,889	29,328	64,876
1976/77	6,141	2,599	3,417	9,252	15,269	15,045	36,455
1977/78	7,208	2,394	10,005	8,027	20,426	25,603	53,237
1978/79	4,139	985	4,253	4,615	9,853	7,593	21,585
Shelled almonds:							
1974/75	1,121	3,083	22,522	8,326	33,930	8,526	43,577
1975/76	1,513	3,795	21,280	8,385	33,460	12,215	47,187
1976/77	2,422	4,062	24,516	9,165	37,803	19,855	60,080
1977/78	2,449	4,038	27,118	8,436	39,592	20,480	62,521
1978/79	2,083	3,670	21,006	5,027	29,703	15,083	46,869

[1] Season beginning September 1 for prunes and raisins and August 1 for almonds. [2] Belgium-Luxembourg, France, West Germany, Italy and Netherlands, Denmark and Ireland. [3] Totals do not add due to rounding.

Source: Foreign Agricultural Service.

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